Faculty of Business and Informatics

An Exploration of Strategy Processes and Stakeholder Involvement in Implementation in Queensland Regional Economic Development Organisations

Tanya Jane Hutchinson BA, BBus

This thesis is presented to fulfil the requirements for
the Award of the Degree of *Master of Business (Research)*
of Central Queensland University

June 2006

Abstract

Strategy offers regional stakeholders an opportunity to collaboratively influence the future direction of their region's economy. However, limited research has been undertaken with respect to strategy processes that are being used by regional economic development organisations. While there are suggestions for the ideal content of regional economic development strategies, the processes by which these organisations develop and implement strategy have not been investigated. This thesis documents an exploratory research project that utilises a case study methodology to identify and consider the processes applied in three different regional economic development organisations.

In order to appreciate the context of regional strategy development, theory on regions, collaboration and strategy is integrated to develop a detailed theoretical framework of twenty seven elements that are thought to contribute to implementation. The presence or absence of these elements in each of the three cases is explored deductively through a review of internal documents and semi-structured interviews with a mix of regional stakeholders. Elements are investigated within cases to understand how strategy is being applied within each particular context. Analysis across cases is documented, identifying both similarities and differences in the presence and absence of elements.

The research found that relationships were important to the continuing future of the organisations. Long term planning was absent in all cases and this absence was attributed to contextual factors such as a dynamic external environment, and a dependence on government funding leading to short term planning cycles. There was also a lack of clarity regarding organisational goals. The processes utilised in all cases

most closely matched Mintzberg and Waters' (1998) umbrella strategy, however, all organisations lacked a strategic approach.

A tentative model was developed to depict elements thought to be the most significant to collaborative regional strategy implementation. These elements are: leadership on strategic planning; good member to member relationships; realism; long term goals; performance measures tied to long term goals; ongoing review and updating of the strategic plan; relevance of the strategic plan; and consistency of activities with the strategic plan. The need for further research to investigate these potential relationships was indicated.

Dedication

This work is dedicated to two important men in my life:

My father, Robert Hutchinson, for sharing his passion for regional economic development and bringing me back to reality every time I was carried away;

My fiancé, Peter Radke, for his commitment to forming a lifetime collaborative partnership through which I can achieve my personal vision and long term goals.

Acknowledgements

Without the assistance and support of a number of key people, I would not have been able to complete this thesis. I am extremely grateful to my supervisors, Professor Paul Hyland and Dr Phil Bretherton for guiding me through the challenging process of postgraduate research. Your support, patience, encouragement and above all, your enthusiasm for applied research, has made a priceless contribution.

I would also like to acknowledge the friendly and helpful service provided by the administration staff in the Faculty Research Office, particularly Natalie and Trish. You made me smile and encouraged me many times when I really needed it.

This research also benefited from the support of three regional economic development organisations and twenty interviewees. I am especially appreciative of your contribution as, without your valuable time and experience, this research would not have been possible.

The final acknowledgement is the most important. I would like to share the gratitude and joy I feel that God has blessed me during this period of my life as '…with God all things are possible' (Matthew 19:26).

Declaration

The work contained in this thesis has not been previously submitted either in whole or in part for a degree at Central Queensland University or any other tertiary institution. To the best of my knowledge and belief, the material presented in this thesis is original except where due reference is made in text.

I have published the following work from this thesis:

> Hutchinson, T & Bretherton, P 2005, 'Translating hopes and visions from regional economic plans into achievements', *Sustainable Economic Growth for Regional Australia 2005*.

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Tanya Jane Hutchinson

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CHAPTER ONE

1.0 INTRODUCTION

1.1 Background

With the increasing role of regions as an additional layer of government in Australia, there is a corresponding need for regional self-reliance and action (Garlick 1999b). Geographically situated between state and local government jurisdictions in scale (Collits 2004), regions have gained recognition due to a combination of social and economic factors. Socially, a region is a grouping of local communities with a shared interest in a particular geographic area (Dore & Woodhill 1999). By working together with other communities within the same geographic area, these local communities discover commonalities and gain allies with whom to work towards meeting local needs. The scale of population gained by combining local communities into a region commands greater government attention. This is encouraged by state and federal governments, who perceive that interacting with a single region rather than a number of individual local communities can be faster and more cost-effective (Worthington & Dollery 2002).

While an economic advantage in itself, this regional provision of government services has other economic impacts. The ability to respond to changes in the economy is greater at a regional level than the centralised national or state level (Beer & Kearins 2004). Regional economies of scale are formed, and regional services or infrastructure are viable when provision at a local level is not. This has been seen with the continued growth of larger regional centres (Collits 2000).

Distinct regional economies form around key industries, due to similarities in the climate and natural resource endowments of areas within a region. Supporting or developing particular industries that contribute to the overall state and federal economy, or supporting a vulnerable regional economy may be state or national economic development goals. These filter down to regions through government programs as economic development objectives.

Effectively, the region offers a way to bring communities together, gain an economy of scale to influence government, and contribute to the growth of the economy by developing regional economies. This implies conscious attention, both in terms of achieving the objectives of local communities and also satisfying state and federal economic growth initiatives. The process of identifying and working towards objectives involves strategy (Davies 2000). This is precisely what is suggested by the Queensland Government through the Department of State Development, Trade and Innovation's Building Regional Economies initiative (Department of State Development Trade and Innovation 2005). The Department states that the creation of an economic development strategy provides direction for the growth of a local economy in the short and long term, leading to regional benefits.

Strategic thinking and a strategic approach are critical to regional economic development (Collits 2000). As the regional scale is thought to be important for businesses aiming for a competitive edge in global and domestic markets (Beer & Kearins 2004), a strategic approach at a regional level offers a mechanism to work towards this edge. Communities, businesses and governments apply a strategic approach on a regional scale to gain required infrastructure and services, exploit a competitive position and contribute to the growth of the national economy. Given these benefits, the application of a combined government, community and business

regional approach is likely to continue in the medium to long term (Beer & Maude 2002). The way in which regional development will evolve over this time, and the scale of benefits gained, will be impacted by external and internal factors.

A key external factor that has already impacted on the shape of regional development is the policy environment. The history of inconsistent public policy approaches to regional development (Collits 2004) may have stunted the evolution of regions as agents of change. Australian regional development programs to date have been subject to great policy variation with programs initiated in one term of government overturned in the next (Garlick 1999a; Kazi 1997). The current federal government approach to regional economic development sees regions taking on responsibility for their own economic development approaches, without the assurance of ongoing funding offered by previous initiatives such as the Regional Development Program. This program supported the operation of Regional Economic Development Organisations across Australia (Fulop & Brennan 2000). A history of restructuring and change has led to a decrease in the overall confidence of regions in their ability to influence their own futures, particularly through strategic planning practices (Miller & Ahmad 2000). Internally, the difficulty in keeping government, business and communities committed to regional initiatives also contributes to a lack in confidence, as does an expected continuation of the trend of few regional strategies progressing from design to implementation (Dore & Woodhill 1999; Kazi 1997).

Experience (Hutchinson 2004, pers. comm., 29 July) with Central Queensland regions supports this concern about the ability of regional organisations to influence their futures. Particularly evident during this experience were: the complexity of issues caused by overlapping bodies with regional jurisdiction; a frustration with a lack of progress in implementing strategic plans; and the domination of activities by funding

concerns and fears. Seen as a potential tool to unite various stakeholders, identify priorities and clarify regional roles and responsibilities, strategic planning appeared to fall short of what was required. This suggested that there may be a difference between theory and practice, and provided the motivation for research to explore the matter.

1.11 Research problem

The interest in exploring the application of strategy theory to regional economic development practice led to the discovery of areas where there had been limited empirical research. While data has been compiled on the attitudes of regional economic development practitioners in Australia (Beer & Maude 2002), there did not appear to be data on the processes applied in regional economic development organisations in relation to strategy. The perception that regional strategic plans were not being implemented (Major 2001) also lacked confirmation or repudiation by data.

While ultimately this research may provide an opportunity to enhance stakeholders' abilities to influence their regions' futures, at this stage an understanding of what approaches are being applied and how they relate to the regional context is needed. An awareness of the characteristics of implementation in this same context is also necessary in order to ascertain whether strategies are being implemented. The study aims to develop the required knowledge.

1.12 Research focus

The overall objective of this study is to explore and describe strategy processes and the extent of strategy implementation in regional economic development organisations. To aid in the achievement of this objective and ensure a multi-faceted description is provided, the following research questions were formulated:

- To what extent are stakeholders involved in strategy implementation?

- How do stakeholders perceive strategic planning?

- What elements of strategies relate to implementation?

- Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?

- How are strategies documented?

- Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?

These questions were addressed by following a methical research approach.

1.2 Significance of the research

The research makes a contribution to knowledge in a field of ongoing interest and relevance to organisations in Queensland and Australia by providing information on the operational and decision making practices of regional economic development organisations. It also considers how strategy and collaboration theories apply to these bodies. This is important because regional development currently attracts significant interest (McKenzie 2003). Within regions, local government Mayors and Councillors, business owners, and residents contribute time and resources to regional economic development initiatives. In 2001/02, the Queensland Government committed ongoing funding of $7m over four years for six regional economic development organisations and five remote area boards (Queensland Department of State Development and Innovation 2005). The Federal Government announced $360.9m committed for grants to regions from 2005/06 to 2008/09 through its Regional Partnerships Program (Commonwealth Department of Transport and Regional Services 2005).

The scope of economic development efforts is broad. In a survey conducted in 2001 (Beer & Maude 2002), 289 local governments, 59 regional organisations and 9 development commissions identified themselves as participating in economic development. This breadth reflects the perception that efforts on a regional scale can achieve economic outcomes at a state, national or global level (Beer & Kearins 2004; Garlick 1999b). Understanding and enhancing these regional development practices could lead to improved economic outcomes. The need to do so has been recognised by the Queensland Department of State Development, Trade and Innovation (2005) with the initiation of the Leading Smart Regions project aimed at developing regional visions and encouraging collaborative actions between regional stakeholders. The knowledge contributed by this thesis supports such efforts through increased understanding of current practices and the applicability of theory.

1.3 Definitions

As many of the fields of knowledge covered by this study have been interpreted in different ways by various authors, it was necessary to identify definitions for key terms. These definitions indicate the way central concepts were interpreted within the study.

Strategy: crafting approaches aimed at achieving goals, in the presence of competition (Spanyi 2003; Davies 2000; Ho & Choi 1997; Hamel & Prahalad 1994; Aaker 1989; Magaziner & Patinkin 1989; Mintzberg 1987; Porter 1987; Bhide 1986; Quinn 1980).

A strategy: the direction of multiple consistent actions towards the achievement of a specific goal (Hutchinson & Bretherton 2005).

Organisation: a social entity, formed to achieve specific goals. It typically has a tangible boundary, operating procedures and rules, communication channels, hierarchy

and access to resources (Robbins & Barnwell 2002; Hall 1999; Bennett 1994; Jones 1993; Mintzberg 1989; Westrum & Samaha 1984).

Region: an identified geographic area that is smaller than an individual state, but is larger than a local government area (Dore & Woodhill 1999). At minimum, three local government areas combined are considered as a region.

Regional community: the entire resident population of an identified region (Crowther & Cooper 2002).

Regional organisation: a group of stakeholders sharing a common interest and combining effort with respect to an identified geographic area (McGrath, Armstrong & Marinova 2003; Gleeson & Carmichael 2001; Dore & Woodhill 1999; Higgins & Savoie 1997; Rowe 1997; Holzapfel 1995).

Collaboration: two or more parties working on a mutual project to achieve their own goals (Faerman, McCaffrey & Slyke 2001; Huxham & Vangen 1996).

Stakeholder: any individual or group that has an interest in the activities or outcomes of the organisation (Gago & Antolín 2004; Brammer & Millington 2003; Berman, Wicks, Kotha & Jones 1999).

1.4 Scope

In order to address the research questions within a finite time frame, study boundaries were identified. This research project is restricted to a single Masters thesis, but has been designed to facilitate replication or use of the data in subsequent projects. Other decisions made when determining the scope of the study included: focusing on strategy process, rather than content; the selection of exploration and description research types and not explanation or prediction; and a consideration of theory from a business

management perspective, rather than the application of sociology or psychology theory. The methodology provided for data to be collected and discussed within its context through case studies, allowing for factors not identified by management theory to be included through the contextual descriptions.

1.5 Research approach

Due to the lack of data available in relation to this topic, the project applied an exploratory, descriptive research design. A case study methodology was utilised to explore strategy processes within the context of three regional economic development organisations. A detailed theoretical framework was developed to ensure coverage of a wide range of strategy, collaboration and implementation elements suggested by theory. This was deductively applied to each case study using semi-structured interviews and a document analysis to ascertain the presence, partial presence and absence of each element. The desired knowledge was generated by analysing this data within and across the cases to form conclusions about strategy processes used and the extent of implementation experienced.

1.6 Thesis outline

This thesis presents the progression of the study from clarification of concepts through to conclusions. Chapter 2 contains a comprehensive review of theory related to the topic, during which concepts are drawn together into a theoretical framework to guide the investigation.   The research design is developed in chapter 3, supported by a Case Study Protocol and assessed using design tests.   The results of data collection are presented in chapter 4, discussing the presence and absence of each element across the three cases and briefly describing each case. The relevance of these findings to the research questions is considered in chapter 5, which presents the conclusions and

implications of the results. Also identified are future directions of research, which build on the results of this study and could provide further contributions to theory and practice.

1.7 Conclusion

Regions are important for local communities, businesses and governments. This chapter found that a strategic regional approach could contribute to the growth of the national economy, provide communities with required infrastructure and increase the competitiveness of local businesses. However, a lack of confidence in the application of a strategic approach was identified. This was partially the result of inconsistent public policy approaches and potentially also due to the complexity of collaboration at a regional scale.

In order to understand and address this concern, and enhance strategic planning practices, the chapter suggested that research is required on strategy processes in regional economic development organisations. The exploratory research approach followed by this study to develop the required knowledge was outlined, and definitions of key terms including regions, collaboration and strategy were provided. A thorough investigation of these concepts that began the research process is provided in chapter 2.

CHAPTER TWO

2.0 LITERATURE REVIEW

2.1 Introduction

This chapter provides an understanding and description of the context of strategy in regional economic development organisations by examining theory on regions, organisations, stakeholders and economic development. Strategy will be identified as a function of regional economic development organisations and different approaches to strategy will be explored before the research problem and resulting research questions are presented. The research questions will be supported by a detailed theoretical framework, developed through a discussion of literature related to organisational and strategy processes.

2.2 Regions

In order to undertake detailed research into the regional context, it is important to clearly understand what this context is, and how it has been defined by researchers. A major defining element of a region is its geographic area. Armstrong and Taylor (1978) state that the view of regions as distinct cultural, social and physical entities is no longer relevant, however, spatial elements continue to be acknowledged as an important part of a region's definition (Dore & Woodhill 1999; Gleeson & Carmichael 2001; Higgins & Savoie 1997; Holzapfel 1995; McGrath, Armstrong & Marinova 2003). Regions tend to be linked to or grouped around administrative nodes, such as combinations of government areas, or economic nodes such as natural resources or infrastructure, that result in an appropriate economic scale (McGrath, Armstrong & Marinova 2003;

Narodoslawsky 2001; Ohmae 1995). Differing populations and resources across areas mean that this economic scale might be achieved through different territories and combinations of elements. Individual regions could therefore display vastly different characteristics (Narodoslawsky 2001). For example, the Queensland Department of State Development, Trade and Innovation (*Showcasing Queensland's Regions* 2005) identify both the Gold Coast and the Wide Bay Burnett regions. The Gold Coast region defined by the Department has a population of 469,214 and is governed by two local authorities, while the Wide Bay Burnett region has a population of 250,503 yet is governed by eight local authorities. The study and development of regions is also complex because different organisations and individuals define different geographic areas as regions to suit their own purposes (Kazi 1997).

The definition of region to be applied in this study is that a region is an identified geographic area that is smaller than an individual state, but is larger than a local government area (Dore & Woodhill 1999). At least, three local government areas combined will be considered as a region. When discussing regions, there can be confusion with the use of the term regional Australia, which refers to areas distinct from metropolitan centres (Armstrong 2003). For the purposes of this study, a region does not make this distinction and can incorporate metropolitan and non metropolitan areas. Another concept that must be clarified is that of the regional community. Given that a community can be seen as 'a uniform whole within a territorially defined boundary' (Crowther & Cooper 2002, p.344), the regional communities discussed in this study will be the entire resident population of an identified region.

While regions have been discussed as relating to a specific geographic area, they were also identified as involving multiple local government authorities and regional communities. Where these parties focus on the entire area within the region, or outside

their own areas, there is a chance they may be required to work together. The concept of collaboration provides a means to explore these regional relationships.

2.3 Collaboration

While regions incorporate a combination of different physical attributes, they also encompass populations and stakeholders with a variety of interests and objectives. One approach to addressing these interests and objectives is to collaborate on a regional scale. This section briefly describes the collaborative approach, its implications and how it might best be applied in a regional setting.

2.3.1 Characteristics and benefits of collaboration

Collaboration between individuals, groups and organisations is an approach adopted in both the public and private sectors when interested parties believe they have a better chance of achieving their goals by working with others (Bititci, Martinez, Albores & Parung 2004; Miller & Ahmad 2000; Osborne & Murray 2000; Vangen & Huxham 2006). The decision to undertake a collaborative approach may be stimulated by changes in the operating environment (Zineldin 1998) or as a result of the increasing pressure on organisations to be responsive and work together with stakeholders (Miller, C. & Ahmad 2000; Vigoda-Gadot 2004). Some organisations are forced to collaborate (Brito 2001) for example, public sector associations delivering health services for whom collaboration becomes a requirement of a government funding their operations (Osborne & Murray 2000; Thompson, Socolar, Brown & Haggerty 2002). Collaboration generally involves two or more parties working on the same project to achieve their own goals (Faerman, McCaffrey & Slyke 2001; Huxham & Vangen 1996) and may be perceived as one alternative to competition (Osborne & Murray 2000). The term has

been used to describe cooperative arrangements (Ma 2004), and while it may be possible to distinguish between collaboration and cooperation (Polenske 2004), this study will not do so.

Organisations within regions might collaborate to achieve a range of benefits. Most prominent are the economies of scale generated from pooling of resources, including funds, staff, skills and knowledge (Faerman, McCaffrey & Slyke 2001; MacKinnon, Cumbers & Chapman 2002; Salmon 2004). This pooling provides an opportunity to recognise the value of a wide range of resources, allowing small and large organisations alike to enter the collaboration with shared power. For example, a small organisation may not be able to financially contribute much to the collaboration, but its expertise in niche markets or its specialised distribution channel may be very valuable (Salmon 2004). Collaborations are also formed to combine similar operations and reduce duplication (Faerman, McCaffrey & Slyke 2001). The networks created and expanded in collaborations can increase an organisation's effectiveness as well as providing a basis for mutual learning (Raco 1999). This may lead to greater innovation across the collaboration (Salmon 2004), a desirable outcome that increases the combined organisations' abilities to generate new ideas and enables the collaboration to respond to opportunities and challenges more effectively (Faerman, McCaffrey & Slyke 2001; McAdam 2000). These benefits can assist an organisation to be more competitive and can support regional development (Raco 1999).

2.3.2 Challenges of collaboration

While the opportunity of additional benefits suggests collaboration is a worthwhile approach, there are a number of barriers to collaboration and challenges to be overcome throughout the process. The principal barrier to collaboration is a lack of trust between

parties, often stemming from a history of competition, inflated egos and institutionalised practices (including confidentiality requirements) that prevent flexibility in working together (Faerman, McCaffrey & Slyke 2001; Mangan 2001; Salmon 2004). At its worst, this can prevent the collaboration from developing, despite the best intentions of potential parties.

The challenges faced during the collaborative process are numerous. Different expectations or a lack of understanding of the process of collaboration can inhibit progress by leading to participants working at cross-purposes (Mangan 2001). Sharing knowledge across the collaboration is difficult and the time and cost for decision making can be greater than in a single entity due to the separate goals of each participant influencing the way they evaluate decisions (Colecchia 2004; Faerman, McCaffrey & Slyke 2001; Mangan 2001; Raco 1999). The larger the collaborative organisation, the harder it becomes to identify the results generated by each individual partner's contribution. This coupled with a perceived lack of control can be threatening for an organisation that is protective of its reputation (Mangan 2001). Also, as contributing resources is sometimes optional, parties might choose not to contribute, but still reap the benefits (Brito 2001). The inter-organisational context and the added complexity this implies suggest that traditional approaches to management may not be applicable (Osborne & Murray 2000). Given the many potential challenges it is hardly surprising that the greatest one of all is trying to keep the collaboration together when disagreements occur (Faerman, McCaffrey & Slyke 2001).

2.3.3 Collaboration success factors

A number of factors have been identified that can contribute to the success of a collaboration. Effective leadership is essential (Faerman, McCaffrey & Slyke 2001).

Leaders can shape perceptions across the collaboration, legitimise approaches, unite the group around a shared vision, intervene when required and stimulate action when a greater contribution is required. However, a leader must be credible and trusted, traits that are undermined if the leader appears to act in self-interest or play political games (Faerman, McCaffrey & Slyke 2001; Thompson et al. 2002). Leaders also have a responsibility to keep the collaboration effective and flexible, as collaborations may suffer from institutional inertia over time (Raco 1999).

Collaborations also benefit from collaborators having the right attitude and compatible goals. A positive attitude towards collaboration held by the partner organisations prior to the exercise is important in establishing a good relationship (Faerman, McCaffrey & Slyke 2001; Salmon 2004). The early stages of the collaborative process can also be aided by all parties having a clear understanding of the process, an understanding of each other, and a perception that there is a positive link between the fortunes of each party (Faerman, McCaffrey & Slyke 2001; Raco 1999; Thompson et al. 2002). Compatible goals are essential (Faerman, McCaffrey & Slyke 2001) and, while they do not have to be identical, they must provide a basis for negotiation of a shared vision for the collaboration (Raco 1999; Thompson et al. 2002).

A number of organisational mechanisms are also relevant to collaboration. Formal structures, such as an institutional presence or an agreement governing the collaboration, can assist in clarifying roles and responsibilities (Raco 1999; Salmon 2004). Co-location, or at least good accessibility between parties, is useful and is further enhanced by strong networks and good communication channels (Raco 1999; Thompson et al. 2002). These mechanisms contribute to the development and maintenance of trust and more open relationships across the collaboration (Faerman, McCaffrey & Slyke 2001).

2.4 Regional organisations

One way that collaboration occurs within regions is through the establishment and operation of regional organisations. An organisation is a social entity, formed to achieve specific goals. It typically has a tangible boundary, operating procedures and rules, communication channels, a hierarchy and access to resources (Bennett 1994; Hall 1999; Jones 1993; Mintzberg 1989; Robbins & Barnwell 2002; Westrum & Samaha 1984). A regional organisation displays these features in that it is a group of stakeholders sharing a common interest and combining effort with respect to an identified geographic area (Dore & Woodhill 1999; Gleeson & Carmichael 2001; Higgins & Savoie 1997; Holzapfel 1995; McGrath, Armstrong & Marinova 2003; Rowe 1997). While the characteristics of combined effort mean that regions can be informal organisations, this study will apply the term regional organisation to formal recognised organisations only, to ensure clarity of discussion.

Due to its inclusive and representative nature, a regional organisation can assist the public and private sectors to work around political, economic and social barriers (Kazi 1997). However, given that regions are commonly identified by governments (Beer & Maude 2002), they display many characteristics of public sector organisations. Services are often intangible (such as economic development), and delivered in a combination of free and fee for service programs. Multiple funding sources mean that the organisation must meet multiple requirements and this increases the complexity of organisational programs and objectives. The employee mix may include volunteers and professionals who have chosen the organisation because of a particular passion for a related cause. There is also confusion between financial and operational objectives, compounded by the number of stakeholders involved in objective-setting processes (Parker 1998). Overall, public sector organisations display great complexity. So regions, as

organisations that span both the public and private sectors, can be highly complex organisations.

The structure of the regional organisation adds another layer to its complexity. Of the basic organisational structure types, such as functional, divisional and matrix, the region as an organisation tends to have a modular structure (depicted at figure 1), where the main organisation is a central hub surrounded by separate specialist organisations. In a private sector company, these specialist organisations may be other companies that handle outsourced services such as marketing, accounting and design (Daft 2004). In a region, these specialist organisations may be government agencies, industry associations, private sector companies, community groups or private individuals. These specialist or member organisations or individuals have their own goals and activities that may be influenced by the region but are unlikely to be subordinate to it. Involvement in the regional organisation and achievement of its goals are additional to the core business of the member organisation.
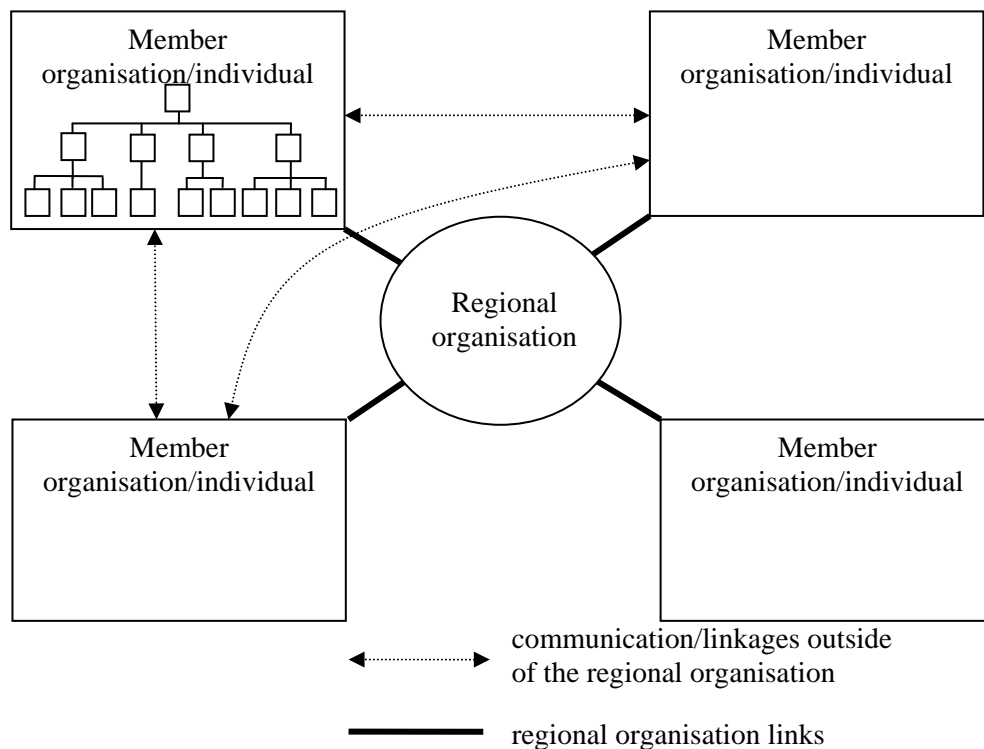
Figure 1: Modular structure of a regional organisation (adapted from Daft 2004, p.98)

Significant challenges arise as a result of the relative independence of its member organisations. As a separate entity, the member organisation has its own hierarchy, culture and relationships. These relationships may be with other member organisations, or they could be with organisations external to the regional organisation. Relationships could be strong and supportive, or they may be negative and cause conflict. Where a positive relationship exists, it could lead to alliances within the regional organisation that seek to gain an advantage for particular members over other members. Some members may be in direct competition with each other. The negative relationships between members could distract the regional organisation from its original purpose through meetings and initiatives serving as a battleground for member organisations.

The modular structure occurs in a regional context because it is relatively easy to establish and does not require changes to individual members' structures or operations

(Daft 2004). Often involvement is limited to senior staff who act as the link between the regional organisation and their own organisation, although sometimes a contribution of resources is also a requirement of membership. When the contribution is minimal, the member organisations do not have a large stake in the regional organisation and this may limit their level of commitment to achieving its outcomes (Daft 2004). For example, resources that may be committed to regional outcomes may be redirected to member organisation outcomes when the risks involved in not achieving those outcomes are perceived as being greater or more immediate.

The regional organisation, as a body that often operates through its member organisations, can use the administrative processes already established within those member organisations rather than duplicating them and this decreases the size of in-house resources required, meaning limited administrative overhead costs. However, this also means the regional organisation has very little control over many activities and functions and must rely on effective relationship management to achieve desired outcomes (Daft 2004). This involvement of member organisations in the various activities of the regional organisation results in their having a stake in the success of the regional organisation.

2.4.1 Stakeholders

The term stakeholder can be applied to member organisations and their staff. A stakeholder is broadly defined as any individual or group that has an interest in the activities or outcomes of the organisation (Berman, Wicks, Kotha & Jones 1999; Brammer & Millington 2003; Gago & Antolín 2004). Common stakeholders identified are: employees; customers; suppliers; communities; governments; shareholders; funding

providers; and Boards (Berman et al. 1999; Leach, Pelkey & Sabatier 2002; Wells, Lee, McClure, Baronner & Davis 2004).

Stakeholder theory highlights the complexity of managing relationships with stakeholders. Generally, regional organisations must address the relevant interests of a range of stakeholders simultaneously (Donaldson & Preston 1995), giving the CEO a role more like a juggler of constituencies than the pilot of an organisational ship (Agle, Mitchell & Sonnenfeld 1999). Hierarchical decision making within organisations has been replaced by negotiated interactions due to the increase in accountability requirements and the corresponding requirement to gain the approval of various internal and external groups as the organisation proceeds (Simmons 2003). The resulting complexity is further magnified by the conflict that is likely to occur when various stakeholder groups pressure the organisation in line with their own priorities (Brammer & Millington 2003; Leach, Pelkey & Sabatier 2002).

Techniques to handle this complexity are based on communication and prioritisation. Taking the time to understand the interests and influences of the various stakeholder groups, and therefore their issues and concerns, will assist with stakeholder management (Brammer & Millington 2003; Cooper 2003; Dansky & Gamm 2004; Fraser & Zarkada-Fraser 2003). This interaction with stakeholders could involve their participation in the organisation to varying degrees, ranging from information sharing, to consultative exchanges, to participation in decision making (Oxley Green & Hunton-Clarke 2003). A process of analysing and classifying stakeholders according to their power, legitimacy and urgency (Bunn, Savage & Holloway 2002) could assist the organisation to understand and focus on the important stakeholders (Rampersad 2001).

2.4.2 Challenges and opportunities for regional organisations

The complexity of regions, collaboration and stakeholder impacts means that regional organisations face a variety of challenges that must be overcome on an ongoing basis. The first challenge faced relates to developing an effective working relationship inside the organisation, given the number and range of separate individuals and groups that must function together. This is especially important as conflicting desires are more apparent in a highly scrutinised community environment (McGrath, Armstrong & Marinova 2003). Secondly, this form of organisation tends to have members with multiple motives, meaning there are often different perceptions of the goals and priorities of the organisation (Bennett 1994; Hudson 1999). These priorities are vulnerable to changes in the external political environment and to the range of power bases operating across the member organisations (Hall 1999; Niven 2003). The various power bases are not necessarily aligned with the regional organisation's hierarchy and are difficult to manage (Bennett 1994). These power bases can also be unequal and lead to manipulation of the organisation (McGrath, Armstrong & Marinova 2003) by influencing decisions so that a particular point of view dominates. Adding to this complexity between formal hierarchy and informal power bases is the tendency of a region to have multiple leaders (McGrath, Armstrong & Marinova 2003). Where these leaders have the loyalty of some but not all of the organisation members, conflict is apt to arise and distract the organisation from its core goals (Bennett 1994).

Communication within regional organisations creates several challenges. As many of the organisation's members are only partially committed to it and are physically located within another organisation, the multiple parallel communication channels that exist can lead to members assuming that other members are receiving information they need when they are not. The power bases can encourage communication grapevines to form,

leading to distorted reality or the isolation of particular organisation members (Bennett 1994).

Another characteristic of the regional organisation that poses challenges for its operation is access to resources. As the provision of funding is not usually a straightforward exchange for goods and services provided to the organisation's clients, there can be confusion of priorities and goals, particularly as some contributions come from member organisations and some are sourced from outside of the region. Also, the tendency to rely on volunteers and donors means that the organisation must constantly earn the trust of these stakeholders in order to enjoy any ongoing benefit (Hudson 1999; MacDonald, McDonald & Norman 2002). It also means that the organisation can spend a large amount of its time on activities aimed at prolonging its existence by acquiring funding and other resources rather than achieving its strategic goals (Westrum & Samaha 1984).

Community expectations are another challenge for regional organisations. As the role of regional bodies is often to provide a service for a regional community, from within the community and using community resources, the organisation must have credibility within that community. Approaches to management and decision making that are effective in individual public and private sector organisations may not be acceptable, due to the expectation that the organisation will be transparent, participatory and widely collaborative (Garlick 1999a).

Given the extent of the challenges faced by regions, just in operating as an organisation, the decision to proceed with a regional approach should not be made in haste. This may be difficult, given that regional organisations can provide communities with a range of opportunities, such as the ability to influence the shape of the region into the future (Frost, Reeve, Stayner & McNeill 2002). In particular, rather than allow outsiders to

make decisions that impact on the region, communities are able to promote, develop, shape and participate in their own opportunities (Dore & Woodhill 1999; MacKinnon, Cumbers & Chapman 2002; McGrath, Armstrong & Marinova 2003; Stehlik 1999). This involvement leads to both learning and satisfaction (McGrath, Armstrong & Marinova 2003), perhaps as a result of having faced the numerous challenges described in this section.

Regional organisations can be more effective than individuals and organisations working alone (Dore & Woodhill 1999). In part this may be due to the number of volunteers involved and the higher level of commitment displayed by volunteers – who are participating due to an interest in the organisation's outcomes – compared to paid employees, who are participating mainly for money (Westrum & Samaha 1984). The potential impact of regional organisations also relates to the combination of members' information, resources and effort creating an organisation more broad in scope than that of each of the members alone (Holzapfel 1995; Miller & Ahmad 2000). A regional organisation provides an interactive opportunity for community members to work with government and the increased profile of the organisation (due to the size and nature of its membership) may also increase the chances of key issues receiving public policy attention, potentially leading to more favourable conditions or incentives (Dore & Woodhill 1999; Sorenson 2000).

Joining a regional organisation brings an opportunity for increased status and visibility, based on the status of the individual members (Miller & Ahmad 2000). For example, a body that counts amongst its members the region's political leaders, large businesses and major media outlets has far more visibility than a single business. There is also a public relations advantage in that the member organisation is seen to be taking an interest in regional issues. Not only can this raise the profile of various issues, it can

also show the member organisation's involvement in the community in a more positive light (Miller & Ahmad 2000).

Regional organisations are therefore collaborations formed by individuals and organisations with a desire to increase the impact of their resources by combining effort on a common activity. This common activity may be different in each region, however, a common area of interest is regional economic development. This study focuses on a combined approach to economic development as the purpose for collaboration on a regional scale and through a regional organisation.

2.5 Regional economic development

With increased global competition, small players such as local businesses, governments and community groups have found it more difficult to influence the external forces impacting on them and have been searching for ways to remain competitive in the global marketplace (Beer & Maude 2002; MacKinnon, Cumbers & Chapman 2002; Raco 1999). One approach that continues to develop in strength and sophistication is that of regions as economic units where collaboration on a regional scale enhances competitiveness on a global scale (Garlick 1999a). However, not all regions are subject to exactly the same influences and, therefore, experience different challenges. For example, rural regions often struggle with declining populations and services, the impacts of an economy vulnerable to a single industry and increased ecological pressures (Armstrong 2003; Collits 2000; Fulop & Brennan 2000; Gleeson & Carmichael 2001; Stehlik 1999). Larger cities and growing coastal regions struggle with social and physical infrastructure shortages, income disparities and urban planning challenges (Gleeson & Carmichael 2001).

Regional economic development interventions offer a way to address regional issues and advance the economy and associated social infrastructure of a community (Beer & Maude 2002). Research (Blair 1998; Kazi 1997; Liou 1998; McKenzie 2003) suggests that economic development has become a key focus for public policy both in Australia and internationally. Historically in Australia, state and federal governments have supported regional development programs but it is local government that now has the key role in driving economic development (Beer & Maude 2002; Collits 2000; Fulop & Brennan 2000). A study of Victorian local government corporate plans (Kloot 2001) found that the most common area covered by the plans was economic development, with 93% of plans featuring objectives related to this topic. This public policy attention is the result of community pressure (Collits 2000). While there is some debate over whether communities can actually influence their futures, the current Federal Government approach of devolving responsibility to regions and a growing emphasis on community engagement suggests that communities are going to have to attempt it regardless (Collits 2000; Kazi 1997).

Within regions, various individuals and organisations are involved in economic development, often through formal regional organisations. The term economic development practitioner is applied to individuals involved directly in economic development activities. These practitioners must serve the interests of a wide range of stakeholders and they do this through a role that may involve leadership, management, planning and research (Collits 2000). Studies (Beer & Maude 2002; Fulop & Brennan 2000) state that practitioners are optimistic about the ability of the regions to drive economic development and believe that the strategic role of regional organisations will continue well into the future. While regional organisations across Australia vary significantly in terms of size, structure and purpose, most tend to be limited in size and

resources, relying on more than one funding source which is subject to change as governments change. In terms of ownership, some regional organisations are a part of local government, some take the form of a board or committee, while others are legal entities such as corporations or associations (Beer & Maude 2002).

2.5.1 Strategic planning as a regional economic development activity

In order to stimulate a regional economy, regional organisations engage in a variety of capacity building activities. A study of local and regional economic development agencies in Australia (Beer & Maude 2002) identifies fourteen core activities, the most common being: improving physical infrastructure; improving strategic planning; acting as an advocate or lobbyist; analysis of the regional economy; encouraging cooperation and networking; improving telecommunications; coordinating government programs; and identification of business opportunities.

As an activity commonly undertaken by regional economic development agencies, strategic planning is used by these collaborative organisations to develop a long term vision and strategies to achieve the vision (Pammer 1998). A key benefit of strategy in this context is that it promotes consistency across various policy processes and initiatives by providing a central, agreed reference point (the long term vision) (Armstrong 2003). It also supports coordination, advocacy, representation, community leadership, education, information brokering and direction setting (Rockloff 2003).

However, while most regional economic development organisations feel they have ample strategic planning capacity (Beer & Maude 2002), this is not reflected by community confidence. Dore & Woodhill (1999) suggest that the capacity of regional organisations does not appear to meet the level of sophistication required by the

complex political, social and economic environment within which regional strategic planning occurs. Particularly in public sector organisations, strategic planning has a reputation for producing a document that sits on the shelf and is never implemented (Creyton 2002; McHattie 2001; O'Regan & Ghobadian 2002). This reputation is not restricted to the public sector, with studies being cited by others such as Sterling (2003) suggesting a large proportion of strategies are not implemented successfully. A possible explanation is related to the long term scope of many strategies - stakeholders become impatient when results do not appear quickly enough and elect to discard the planning process rather than to improve it (Dore & Woodhill 1999).

If the aim of a strategic planning process was the insights and experiences gained during the process itself, it could be considered to be effective even if the final document was never referred to again. However, in most cases, the aim of a strategic planning process is to achieve economic outcomes so it is important that the strategy document contributes to these outcomes by being action-oriented and does not 'sit on the shelf gathering dust' (Major 2001, p.1). This statement may be applied to the status of strategy documents that are not implemented, and describes the cynical view held by communities who have experienced years of planning with no obvious results (Jones & Zulpo 2005; Western Sydney Regional Organisation of Councils 2000). Community cynicism is recognised, and attempts are made to address it: 'We don't just want rows of documents on the shelf; we have the responsibility to help things happen' (O'Brien 2002, p.2).

While the practitioners appear to see their role as actioning strategy, some researchers have concluded differently. A suggestion has been made in one study (Rockloff 2003) that while the core role of regional groups is to produce a regional strategic plan, those groups are not involved in operational aspects and are therefore not the implementers of

the strategy. This may be due to member organisations (of the regional organisations) having specialisations in certain areas or being in a position to more easily take on part of a project than the staff of the regional organisation. Generally, implementation is reliant on stakeholder involvement (Collits 2000; Rockloff 2003) so it may be the case that strategies that are not being implemented are not gaining sufficient stakeholder involvement.

2.6 Strategy

To examine the involvement of stakeholders in strategy implementation further, it is important to develop a sound understanding of strategy. This is a complex task, given that one of the few statements made about strategy that seem to be consistent across the literature is that there is no single accepted definition of the term (Feurer & Chaharbaghi 1997; Hutchinson 2001; O'Regan & Ghobadian 2002). Academics and practitioners alike are left to select and justify their own preferred approach. Part of the confusion around strategy relates to the tendency to use the term to describe the overall field as well as a tool applied within the field. In business there is a field of strategy, just as there is management, marketing, human resources and information technology. But the term strategy is also used as an item – for example an organisation might develop a human resources strategy. This double use of the term adds to the ambiguity about what strategy actually is.

2.6.1 Strategy as an item

This discussion will consider strategy as an item before examining the overall discipline of strategy. According to various views, a strategy can be a vision, a purpose or objective, an outcome, a project, a pattern, a plan, or a policy (Blair 1998; Boyd, Gupta

& Sussman 2001; Boyne & Walker 2004; Mintzberg & Waters 1985). For example, a desired outcome of new business formation is termed an economic development strategy by Blair (1998). Another perspective is presented by Boyne & Walker (2004) who use the term strategy to refer to either organisational stance or specific steps taken to operationalise this stance. Boyd, Gupta and Sussman (2001) also add to the complexity by inferring that a strategy can either be a desired course of action, an objective or an injection. The particular use of the term strategy as a concept appears to be a matter of personal preference.

As a definition is required for this study, key concepts will be combined to create an operational definition able to be utilised in field work. The first concept is that strategy relates to an end goal, outcome or focal objective (Boyne & Walker 2004; Brews & Hunt 1999; Feurer & Chaharbaghi 1997). The second is that strategy involves patterns of actions or clusters of decisions (Boyne & Walker 2004; Brache 2005; Brews & Hunt 1999; Mintzberg & Waters 1985). Therefore, a strategy may be considered as the direction of multiple consistent actions towards the achievement of a specific goal (Hutchinson & Bretherton 2005). When applying this definition, if an action occurs that is either not consistent or not directly related to a specific goal, it is not a strategy, merely an action.

It appears that the definitions for terms used within strategy are derived from their relationship to each other and the hierarchy in which they are used. For example, Davies (2000) discusses policy, strategy and resources as three equally weighted elements in an overall strategy process. Another approach (Campbell & Alexander 1997) describes a hierarchy of mission, objectives, strategy and tactics where each term refers to a distinct sub-component of an overall organisational strategy. Given this

diversity of definitional options, it is important to be able to clarify and interpret different organisational strategic frameworks.

Strategy terms can be grouped into layers of terms commonly used in a similar manner. At the highest level are aspirational terms: goal, aim, vision, objective, end and mission. These terms describe the overall organisational purpose and intent of strategy and are used together or interchangeably. At the next level the terms strategy, outcome, policy, and often objective, may be used – more specific than the aspirational terms but not as yet operational. The operational terms most commonly used are plan, action, program and tactic, dealing with the greatest level of detail as to how the organisational purpose will be achieved (Brews & Hunt 1999; Campbell & Alexander 1997; Davies 2000; Feurer & Chaharbaghi 1997; Hutchinson 2001; Roos, Bainbridge & Jacobsen 2001; Tsiakkiros & Pashiardis 2002; Wilkinson & Monkhouse 1994). These layers put the items into some order but it should be noted that terms like plan are used differently by different authors and may describe elements across all levels. While this study aims to use specific terms for ease of discussion, the methodology should allow for consistent recognition of other terms where the framework they appear within indicates that they have the same or similar meanings. A further degree of clarity can be provided by considering that these frameworks fit within the concept of strategy as a discipline. In section 2.6.2, the focus moves from specific terminology within strategy to the overall field itself.

2.6.2 Strategy as a discipline

The business literature identifies the key purposes for strategy as: winning (Ho & Choi 1997; Magaziner & Patinkin 1989); achieving superior performance (Porter 1987; Spanyi 2003); achieving goals and objectives (Davies 2000; Quinn 1980); crafting

approaches to market opportunities (Mintzberg 1987); and competing (Aaker 1989; Bhide 1986; Hamel & Prahalad 1994). So, strategy can be regarded as crafting approaches aimed at achieving goals, in the presence of competition. This is consistent with the origin of strategy. The term itself relates to the Greek word *strategia,* meaning generalship, which was applied as early as 508 BC (Cummings 1994; Hindle 1994). Consistent with this, the principle of strategy was originally related to war and Sun Tzu's work on the Art of War originating over 2000 years ago is still regularly cited in relation to military strategy as well as corporate strategy (Cummings 1994; Mintzberg & Quinn 1996).

Organisations can benefit from using strategy. It provides direction (Flaherty, Jirovec & Allen 2002), control (Mintzberg, Ahlstrand & Lampel 1998; Tavakoli & Perks 2001), meaning, passion and motivation (Hamel in Crainer 1996), insights into an organisation and its markets and patterns (Andrews 1987; Campbell & Alexander 1997), a basis to manage change (Burgi, Victor & Lentz 2004; Liedtka & Rosenblum 1996; Tavakoli & Perks 2001) and a basis upon which to program actions (Leonard & McAdam 2002). It involves developing ideas and visions (Denton & Wisdom 1989), continuous adaptation and learning (Hutchinson 2001; Liedtka 2000), analysis and synthesis of information (Mintzberg in Voros 2003), decision making (Suutari 1999) and organisation of effort (Mintzberg 1987). In summary, strategy is directive, active, adaptive, creative and meaningful.

The range of elements identified within the field of strategy suggests that there are many different approaches to its practice. This is indeed the case, according to Mintzberg, Ahlstrand & Lampel (1998). Since as early as the 1950s, experts (such as Ansoff, Porter, the Boston Consulting Group and Mintzberg) have been developing and debating a range of theories. Initially this involved adding to an established school of

thought, for example, the Positioning School built on the Planning School which built on the Design School (Mintzberg, Ahlstrand & Lampel 1998). Alternative views are also put forward that contrast with established schools, the most notable being the emergent view of strategy. An approach that became popular in the last decade is that of the resource and capabilities view of strategy (Collis & Montgomery 1999; Stalk, Evans & Shulman 1999). This approach suggests that the way to succeed in the presence of competition is based on the hard and soft resources of the organisation and what the organisation can do better, differently or more cost-effectively than its competitors when applying its resources. With the ability to review the range of views available on strategy, researchers (such as Danny Miller and the Configuration School) (Miller 1996) began to mix and match approaches, even suggesting that an organisation can switch between approaches as required (Mintzberg, Ahlstrand & Lampel 1998).

Despite the diversity of views, strategy can be discussed by considering two different concepts with which practitioners may identify. These are planned strategy and emergent strategy. While they may co-exist within an organisation (Mintzberg, Ahlstrand & Lampel 1999), these two concepts are most easily understood when they are compared and contrasted with each other. The planned view is characterised by logic, analysis, structure and process. Supported over the decades by academics including Ansoff (1960s), Porter (1980s) and Davies (1990s), the planned view has also been termed: rational; deliberate; scientific; formal; and intended (Fuller-Love & Cooper 2001; Liedtka & Rosenblum 1996; Mintzberg, Ahlstrand & Lampel 1998; Parnell 2004). Strategic planning tools are the most commonly used of all management tools (Rigby & Bilodeau 2005). Examples of these tools are the strengths, weaknesses, opportunities and threats (SWOT) analysis (Novicevic, Harvey, Autry & Bond III

2004), Porter's Five Forces industry analysis (Mintzberg, Ahlstrand & Lampel 1998) and the Boston Consulting Group matrix (Pellegrino & Carbo 2001).

At their extremes, planned strategy contrasts strongly with emergent strategy, which has been promoted as more closely reflecting actual practice than the planned approach (Mintzberg, Ahlstrand & Lampel 1998). Emergent strategy is characterised by art, instinct, learning, synthesis, and trial and error and has been most aggressively promoted by Mintzberg (Fuller-Love & Cooper 2001; Liedtka & Rosenblum 1996; Mintzberg & Waters 1985; Parnell 2004). An image presented by Mintzberg (1987) to support the emergent view is that of the strategist as a sculptor, creating a vase. He or she has no idea of how the completed piece will appear, but allows the clay to shape on the potters wheel and makes instinctive decisions in response to what forms.

The differences between planned and emergent strategy can be summarised through three factors: formality; nature; and intent (Harrington, Lemak, Reed & Kendall 2004; Mintzberg, Ahlstrand & Lampel 1998; Parnell 2004; Suutari 1999). Planned strategy is formal, generally involves a structured process that separates strategy development and implementation, and has finalised strategies and a physical strategy document. Emergent strategy intertwines strategy development and implementation, generally sees strategies evolve before they can be finalised and rarely results in a physical strategy document. Planned strategy is prescriptive in nature and directs organisational decision making whereas emergent strategy tends to be more reactive and applies as an idea is formed. The intent of planned strategy is clear, often involving a conscious gathering of information, attempts to forecast the future and some long term planning. This contrasts strongly with emergent strategy, which responds to changing situations, assumes forecasting is unreliable and has a tendency to be short term. The combination of these three factors leads to a clear distinction between planned and emergent strategy

(Harrington et al. 2004; Mintzberg, Ahlstrand & Lampel 1998; Parnell 2004; Suutari 1999).

While planned and emergent strategy differ in their extreme forms, they are not mutually exclusive and can be applied either together or as elements of an overall process (Manderscheid & Kusy 2005). Mintzberg and Waters (1998) describe the way strategy is applied differently by organisations through a typology of strategies (summarised in figure 2). Planned strategy is thought to occur in stable environments and where organisations apply strong control mechanisms. Entrepreneurial strategy is found in small organisations where the head of the organisation is able to exert a great deal of influence on its direction. Ideological strategy contrasts with this and is identified where organisation members clearly share a belief that guides their choices. Umbrella strategy operates in a less stable environment with organisation leaders setting the boundaries for strategies and the details emerging over time in response to the environment. Process strategy also operates in a dynamic environment and strategy making is controlled by leaders setting processes for who can be involved in strategy, without setting strategy themselves. Unconnected strategies occur where diverse divisions of organisations need to develop strategy independent of each other. Consensus strategy is found where these different players find themselves setting consistent strategy due to similar responses to changes in the environment. Imposed strategies tend to occur where one or more external parties have significant influence over the organisation and use this to direct strategy.
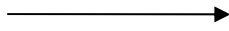
Planned strategy: Leaders' intentions for organisations are formulated, published in a plan, resourced and then implemented in a controlled way. Planned strategy requires strong control mechanisms and works most effectively in a stable environment.
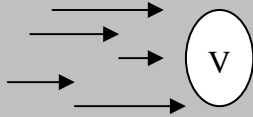
Entrepreneurial strategy: The head of the organisation has a vision and moves the organisation towards it by consistently influencing decisions. Due to the need for one individual to have a strong influence, this approach is found mostly in small, entrepreneurial organisations.
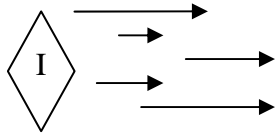
Ideological strategy: The collective members of the organisation have a shared vision that they believe in and they make consistent decisions by following this ideology. The nature of such a strong belief means that the vision is resistant to change.
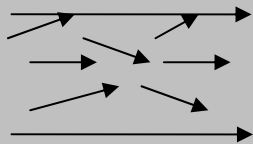
Umbrella strategy: The leaders of the organisation set boundaries within which the organisation operates. This allows for decisions to be made that take account of changes in the environment.
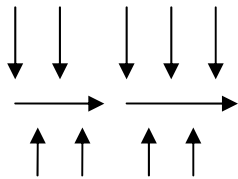
Process strategy: Leaders do not set strategy, but processes by which strategy is made. While this provides some constraints on the direction of strategy by affecting who is able to be involved in it, process strategy allows flexibility to account for changes in the environment.
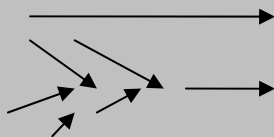
Unconnected strategies: Divisions of organisations are able to develop their own patterns of decisions. This often leads to limited linkages between divisions of the same organisation.
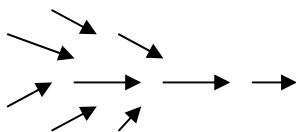
Consensus strategy: A number of players in the organisation adjust to each other's responses to the environment and a consistency of approach emerges.
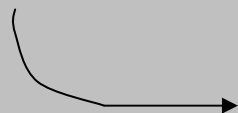
Imposed strategies: The environment forces the organisation along a particular path. This might be through the influence of a major funding source or political directives.

Figure 2: Typology of strategies (summarised from Mintzberg & Waters 1998, pp.22-31)

The differing characteristics of combinations of planned and emergent approaches displayed by each form of strategy suggest that certain elements of strategy may have a

greater influence on strategic effectiveness than other elements. This study offers an opportunity to investigate whether any of these approaches apply in a regional context and which elements of strategy are particularly relevant. Section 2.6.3 identifies the anticipated benefits of aspects of planned and emergent strategy to the regional organisations described in section 2.4.

2.6.3 Application of strategy to the study

As planned strategy and emergent strategy offer advantages in different contexts, elements relating to both are desirable. Planned strategy enables coordination of long term actions aimed at organisational sustainability by integrating various functional activities (Anderson 2000). Emergent strategy is useful to organisations operating in a dynamic environment by providing flexibility to seize opportunities and defend against threats (Walsh, Lok & Jones 2006). There are also a number of specific aspects of planned and emergent strategy that may assist regional organisations to implement a strategic approach to economic development.

A planned approach may address the known operational challenges faced by regional economic development organisations more effectively than an emergent approach (Hutchinson & Bretherton 2005). In particular, three significant advantages have led to a focus on planned strategy rather than emergent strategy. These advantages relate to a perceived superior ability of planned strategy to: meet the need for a formal strategy development process; provide clarity; and agree on a future organisational direction. These will be considered in turn before addressing shortfalls in an emergent approach to strategy.

Planned strategy provides a formal strategy development and implementation process (Graetz 2002; Liou 1998). The lack of such a formal process in emergent strategy

means that it is more reliant on the individual. In situations where the individuals involved have no interest in the organisation's goals, those individuals are unlikely to offer the creativity and insight central to emergent strategy (Dvir, Kass & Shamir 2004). In these circumstances, planned strategy provides a formal reference point for these individuals which guides their effort rather than relying on them to come up with the direction. There is also a risk in emergent strategy of strategy not appearing when it is needed, for example during a crisis (Mintzberg, Ahlstrand & Lampel 1998).

Planned strategy enables goals and objectives to be more explicit (Manderscheid & Kusy 2005). This reduces the chance of misunderstanding and increases clarity and opportunities for shared understanding (Zagotta & Robinson 2003). It also provides a basis for the development of meaning and passion (Dvir, Kass & Shamir 2004). Given the lack of formal strategy documentation and the ever changing status of strategies in emergent strategy, there is a danger of this approach leaving stakeholders confused or having numerous different interpretations put on organisational decisions and actions (Zagotta & Robinson 2003).

Planned strategy provides direction for these stakeholders (Grant 2003). One of the advantages identified for emergent strategy is its ability to cope with change, however, a willingness to change direction too often can also be a weakness. The term irrational incrementalism is used to describe this phenomenon (Hayes and Jaikumar in Mintzberg, Ahlstrand & Lampel 1998). This can lead to a lack of commitment on any particular direction, especially where a long term commitment is required, for example, to enable acquisition of resources or the incremental improvement of processes (Suutari 1999). According to Mintzberg, Ahlstrand & Lampel (1998), a lack of direction may also undermine good strategy or lead to the wrong strategy being selected (where emergent strategy is seen as contrary to predetermined strategy).

Key elements of emergent strategy – creativity, learning and flexibility – address weaknesses of planned strategy and are essential to this study. Firstly, the incorporation of creativity to develop an exploratory rather than ritualistic strategy process and that applies the creativity of a wide range of stakeholders rather than an elite planning group (Hamel & Prahalad 1995). Secondly, the application of learning through experimentation and chance discoveries leading to the development of innovative strategies (Mintzberg 1994). Thirdly, flexibility to respond to the unexpected and cope with a dynamic and challenging environment (Flaherty, Jirovec & Allen 2002). The addition of these emergent elements adds depth to the planned strategy process.

2.7 Research on strategic planning in regional economic development organisations

Many authors (Armstrong 2003; Beer & Maude 2002; Blair 1998; Collits 2000; Dore & Woodhill 1999; Felsenstein, McQuaid, McCann & Shefer 2001; Fulop & Brennan 2000; Kazi 1997; Liou 1998; Martinez 1997; Mercer 1997; O'Connor, Stimson & Daly 2001; Pammer 1998; Raco 1999; Rowe 1997) have noted the emergence of regional economic development and attempted to address the lack of understanding regarding approaches that might be effective. A number of research projects have been undertaken, ranging in focus from considering the history of regional policy in Australia (Beer & Maude 2002; Kazi 1997), to the specifics of regional economic development policy (Collits 2000; Felsenstein et al. 2001; Raco 1999), including particular types of regional development organisations (Fulop & Brennan 2000; Martinez 1997), and the application of strategic planning for economic development (Blair 1998; Liou 1998; Pammer 1998). Other studies have also examined particular regions in Australia and the factors that impact on them (Garlick 2005; Mercer 1997; O'Connor, Stimson & Daly

2001; Rowe 1997), while yet other studies are interested in trends in sustainable regional development in Australia (Armstrong 2003; Dore & Woodhill 1999).

These studies have increased the awareness of what has been happening in this field over the past decade, but perhaps because of the relative newness of current economic development approaches (Collits 2000) few studies have gone into detail examining processes in regional economic development and strategy. Studies that discuss process provide a simple outline of the traditional strategic planning process and suggest that it be applied (Collits 2000; Liou 1998). Some recommendations made in relation to strategy processes came out of a workshop on natural resource management and were presented by Dore and Woodhill (1999) in their seminal work *Regional Sustainable Development.* Dore and Woodhill (1999) identified eighteen essential characteristics of sustainable regional development strategies. These are presented in table 1.

Table 1: Characteristics of sustainable regional development strategies

Characteristic	Explanation
Purposeful	clear reasons for why it has been developed
responsibilities clarified	includes a well-defined division of responsibilities and roles of all stakeholders
clear process	utilises an appropriate, widely understood, equitable, interactive and forward-moving process for development and implementation
Visionary	based on a well-developed, widely shared, long term vision
Prioritised	prioritises, in a transparent and equitable way, the importance and/or logical order of activities

Focused	clearly identifies the key issues for the region
Holistic	takes an integrated or holistic view of issues taking account of: social, cultural, economic and ecological issues, their actions and interdependencies
Integrated	integrates with other plans, strategies and initiatives
communicative and credible	effectively communicates high-quality, honest information
options evaluated	assesses positive and negative impacts of alternative options
Negotiated	agreements about implementation need to be negotiated
action-and-outcome oriented	is designed to produce action and is held accountable by the record of its outcomes
Costed	attempts to identify monetary and non-monetary costs and benefits of the options
monitored, evaluated, adapted	includes a simple framework for monitoring, evaluation and review
institutional backing	to be effective, the strategy needs to be supported by appropriate, empowered and resourced institutional/organisational structures
Appropriate scale	recognises that action may best occur at the regional, sub-regional or local level
Informed and informing	utilises and shares the best available information and builds the knowledge and research base
Inclusive	high level of community (stakeholder) involvement and ownership

Source: adapted from Dore & Woodhill, 1999, pp.374-375

Despite presenting a detailed list of recommended strategy characteristics, Dore and Woodhill (1999) do not investigate the application of these characteristics to practice, merely stating that the checklist has been used by many organisations. This suggests that further research is warranted to verify each of the eighteen items. A similar requirement arises for the recommendations made by the Queensland Department for State Development, Trade and Innovation in its electronic publication, *Building Regional Economies: Tools for Economic Development* (2005). This publication provides a checklist for practitioners but does not appear to be based on any research on the issue. Key components of strategies considered desirable in the publication are outlined in table 2.

Table 2: Components of an economic development strategy

assessment of economic base, including research and analysis
future vision statement
realistic goals
strategies aimed at the goals
action plan
evaluation and selection of options
allocation of resources
involvement of key regional leaders
relevance to geographic area
consideration of knowledge and information
evaluation of current strategy
ongoing review and key indicators

Source: (summarised from Department of State Development, Trade and Innovation 2005)

Other areas of further research recommended in relevant studies include: evaluation of economic development programs resulting from a strategic planning process (Blair 1998); participation models for regional organisations (Armstrong 2003); and factors that add to the dissolution of implementation efforts in regional economic development (Pammer 1998).

2.8 The research problem

Given that limited empirical research has been undertaken in the area of regional economic development and strategy implementation, the first requirement is to provide data on this phenomenon. While the literature presented in sections 2.1 to 2.7 suggests certain approaches contribute to stakeholder involvement in implementation, it is not known which of these elements exist in the regional context or what the particular characteristics of implementation are in the same context. This study is therefore concerned with painting a clearer picture of strategy and implementation processes in regional economic development organisations in Queensland, before revisiting some of the potential relationships between strategy processes and stakeholder commitment to implementation that have been suggested in this review of the literature.

2.8.1 The research questions

The overall objective of this study is to explore and describe strategy processes and the extent of strategy implementation in regional economic development organisations. This involves consideration of the following:

- To what extent are stakeholders involved in strategy implementation?

- How do stakeholders perceive strategic planning?

- What elements of strategies relate to implementation?

- Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?

- How are strategies documented?

- Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?

The elements of strategies and implementation referred to are outlined in section 2.9 and form the basis of the study's theoretical framework.

2.9 Theoretical framework

The theoretical framework for this study is concerned with how strategy occurs in regional economic development organisations. The literature on strategy offers much advice on ways in which strategy can be more effective in organisations and the theoretical framework aims to reflect the key components of this theory. Conscious of the idea that there is no single agreed process for organisations to apply strategy, the theoretical framework identifies individual strategy elements rather than alternative models, so as not to limit investigation to the elements contained in any one model. This offers an opportunity to examine and compare regional economic development organisations at a higher degree of detail. The twenty seven strategy elements presented in this section have been grouped into the four categories shown in figure 3 to provide some order to discussions covering the elements. While each element has its own distinct purpose, it will have more meaning when it is considered beside other elements (Olsen & Haslett 2002), therefore, discussion will be both on individual elements and combinations of elements.
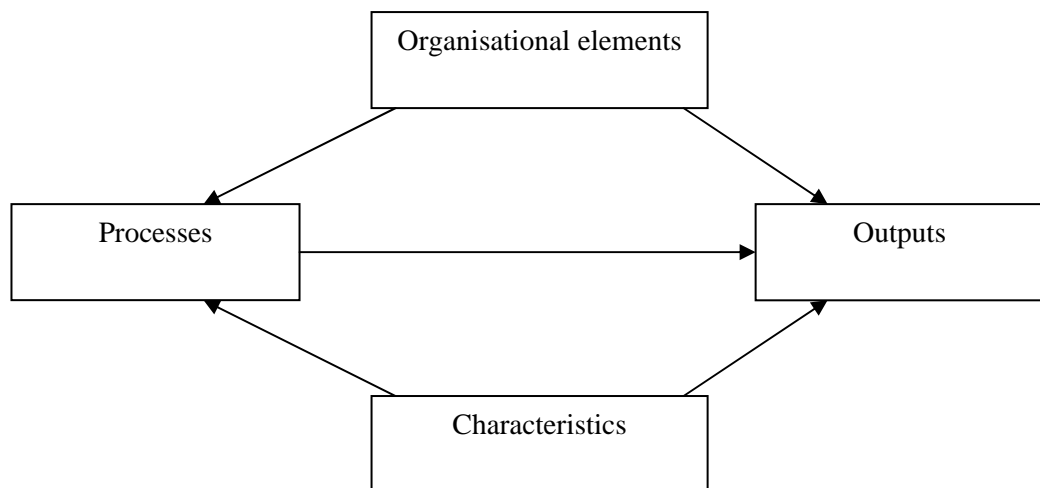
Figure 3: High level theoretical framework

2.9.1 Organisational factors

The organisational factors consider organisational arrangements behind the strategy process. As such they combine collaboration success factors discussed in section 2.3.3 and organisational contextual factors required for strategy as addressed in sections 2.2 and 2.6. The organisational factors are:

- leadership;

- shared understanding of purpose and goals;

- member to member relationships;

- clarity of roles and responsibilities; and

- involvement of implementers in strategy formulation.

As indicated in section 2.3.3, effective leadership is essential to collaboration (Bowersox, Close & Stank 2003). Given that the application of strategy in regional organisations often involves collaboration between a number of member organisations, an effective leader that can unite the group and stimulate action will be very important to the progress of strategy (Faerman, McCaffrey & Slyke 2001; Thompson et al. 2002).

In many situations, it may fall to the leader to keep the organisation focused on the strategy, recognise when the benefits of strategy are not being realised and drive the resolution of the issue. This focus or discipline is particularly important in a complex organisation, such as a regional economic development organisation, where members must juggle different agendas and loyalties to other organisations and causes.

One way in which a leader can encourage focus is by ensuring members have a shared understanding of the organisation's purpose and goals (Salmon 2004; Thompson et al. 2002), as well as an understanding of the purpose strategy fulfils for the organisation. An accurate and deep understanding of the purpose offers benefits that would facilitate implementation of organisational strategies, such as: more timely and appropriate decisions; increased productivity; improved retention; increased morale and satisfaction; and increased commitment (Boswell & Boudreau 2001). This is complemented by good relationships and effective communication channels across the organisation. Effective interpersonal communication channels between members and frequent communication positively impact on implementation efforts (Chimhanzi 2004). Good relationships between the various members as collaborative partners can increase the willingness of those partners to commit to shared strategies, and would also facilitate sharing of information and resources within the organisation to the benefit of strategy implementation (Faerman, McCaffrey & Slyke 2001; Freedman 2003; Peng & Litteljohn 2001). These relationships, and the ability to work together to achieve goals, will be enhanced by the clarification of roles and responsibilities as the transparency this provides increases the likelihood of trust developing within the collaboration (Faerman, McCaffrey & Slyke 2001; Raco 1999; Salmon 2004).

In addition to clarity of roles and responsibilities is the need to involve the relevant organisational members in the important stages of the process. This does not always

occur – Liedtka and Rosenblum (1996) suggest that strategy is often like the brain inside the head of senior management, physically separate from the hands used to implement it. However, as people tend to work harder towards achieving a goal if they are involved in setting it (Parnell 2004), involving implementers in strategy formulation can assist in creating strategies that address the reality of the implementation process and environment and may contribute to the overall successful implementation of the strategy (Campbell & Alexander 1997; Manderscheid & Kusy 2005). At regional economic development organisation level, it is useful to know who is setting the strategy and who is implementing it.

2.9.2 Process elements

The process elements include a number of distinct but related processes that occur as part of formulating and implementing strategy. They include elements present as part of a formal cycle as well as those that occur at irregular intervals in response to changes in the context. These items and their relationship to the overall strategy process will be discussed with the aid of a contextual strategy model. The process elements are:

- knowledge generation and sharing;

- analysis;

- options evaluation;

- recognition of emergent strategy;

- strategy and progress review; and

- reference to strategy/ guidance of decisions.

A contextual strategy model should recognise the advantages of planned strategy while capturing useful elements of emergent strategy if it is to be relevant for this study.

Farjoun's (2002) organic model of the strategic management process allows for this combination. This model is particularly useful for identifying key components of strategy in an organisational context, but it also facilitates discussion of various strategic processes. Its applicability to this study is supported its consistency with Kazi's (1997) suggested process for economic development: self-education, strategy development; and implementation of projects (Kazi 1997). The organic model of the strategy process is included as figure 4.
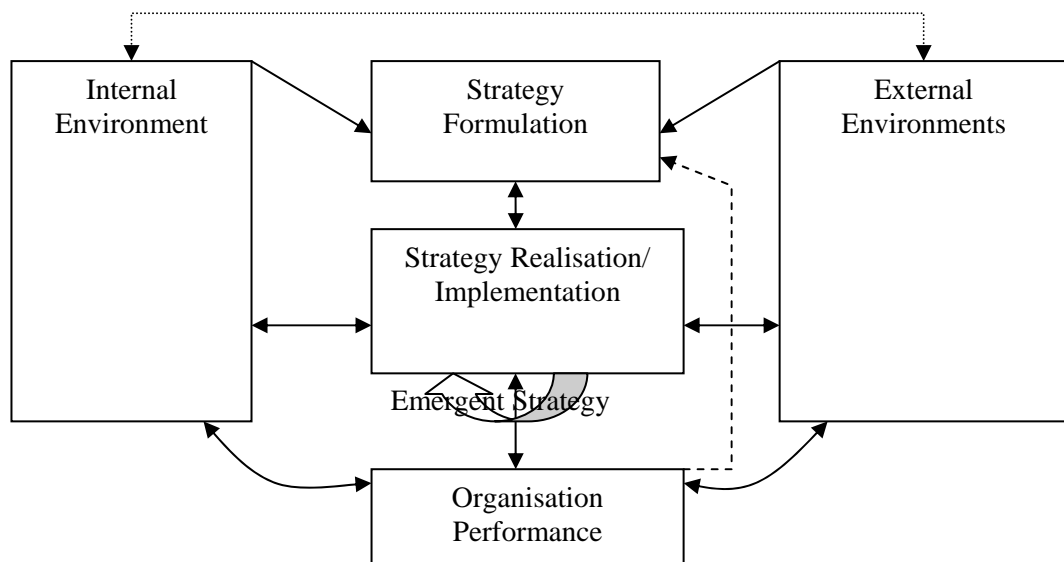
Figure 4: Strategy model (modified from Farjoun 2002, p.579)

The model also provides a visual depiction of the strategy groupings put forward by Okumus (2003) when searching for a framework to implement strategies in organisations: strategic content; strategic context; operational process; and outcome. Strategy formulation is effectively about agreeing the strategic content. This is done within the strategic context, which is represented by the relationship between the internal and external environments and the various strategic processes. The internal environment incorporates all elements found within the organisation, such as its culture,

physical resources (funding, equipment, staff), processes, practices, and knowledge (Tsiakkiros & Pashiardis 2002); and the external environment involves all relevant factors outside the organisation's direct control, including industry and suppliers, political climate, competition, and markets (Kippenberger 1998; Roos, Bainbridge & Jacobsen 2001). The strategic context impacts on strategy implementation and this occurs during the operational process aspect of Okumus' (2003) framework. The operational process can be likened to the strategy implementation component of the model, which occupies a central position connected to all other elements. The outcome of the strategy process described by Okumus (2003) is represented in the model by the organisation performance component. The deliverables that are reviewed as part of the organisation's performance are outcomes resulting from its operational processes.

Given the interrelationships between the various parts of the model (see figure 4, p. 57), generating and sharing knowledge on the impacts of each on one another is very important to the functioning of the strategy process (Kazi 1997). For example, the formulation and implementation of strategy does not occur in a sealed space over which the organisation has complete control, rather in real time and within the internal and external environments (Farjoun 2002). Knowledge of changes in these environments provides an opportunity to keep the strategy relevant, and contributes insight to progress and performance reviews. To gain this insight, the regional organisation might apply a regular process of research and analysis (e.g. media monitoring, budget review cycles) or recognise spontaneous insights that occur informally and trigger further research and analysis (e.g. comments made at a meeting, exposure to a parallel situation) (Flavel & Williams 1996). Ensuring this analysis can take place and can feed into strategy formulation, implementation and review is important (Okumus 2003). The regional

organisation should have a number of different analytical processes and tools in place to maximise the insights gained (Munive-Hernandez, Dewhurst, Pritchard & Barber 2004).

Often, a part of the analytical process requires that the organisation chooses between different options. Given that strategy involves the direction of consistent actions towards organisational goals, the way in which options are evaluated needs to encourage decisions being made that are consistent with each other and with the organisational goals (Harrison & Pelletier 2000). The complexity of the options evaluation process depends on the particular organisation but may vary from a simple consideration of how the options contribute to strategic priorities to a detailed assessment against specific criteria. The scale of the decision and the number of alternatives are likely to influence the complexity of the process. The need for consistency in options evaluation applies also to emergent strategy. Figure 4 (p. 57) depicts emergent strategy as an element that occurs during implementation, as continuous adaptation and additional strategies that arise during the process (Harrington et al. 2004; Liedtka & Rosenblum 1996). Yet in order for an emergent decision to be recognised as strategy, there must still be some consistency of actions selected in response to changes in the environment, so there is also a need for consistent options evaluation processes for emergent strategy.

The formulation of an emergent strategy could be triggered in response to an opportunity or threat that arises suddenly, or as a result of on opportunity or threat that is identified as part of a formal review cycle (Nielsen-Englyst 2003). This review cycle is important to the continued relevance of the strategy because of the opportunity for recognition of emergent strategies. The organisation may be implementing an emergent strategy rather than the strategy initially planned, and if this change is not recognised in strategy documents those documents lose their currency. A regular review of strategies

also facilitates organisational learning (Olsen & Haslett 2002) and provides a supporting mechanism to capture any strategies that are no longer relevant and have diminished in significance yet are still being allocated valuable resources (Suutari 1999; Tsiakkiros & Pashiardis 2002).

As included in figure 4 (p. 57), the review of strategy performance feeds back into the strategy formulation process (Kippenberger 1998). Performance measurement processes are essential to strategy because they assist an organisation to identify whether any progress is being made on specific items. They also allow for a more accurate understanding of where the organisation is in the implementation process and what adjustments might need to be made to reach the strategic goals (Freedman 2003; Okumus 2003).

Other strategic processes that occur as part of implementation must also be considered, particularly those that relate to how strategy documents are being used by implementers. There is a danger of disconnection between organisation members and the strategy - if stakeholders do not know or understand the strategy they find it much more difficult to contribute effectively to its implementation (Boswell & Boudreau 2001; Killen, Walker & Hunt 2005; Parnell 2004). This disconnect can be addressed through processes that encourage constant reference to the strategy itself. If implementers are regularly referring to the strategy, there is a higher probability that implementation decisions will be consistent with the intention of the strategy (Jones & Zulpo 2005), and where the strategy is found to be losing relevance, this would trigger a review or amendment. A formal process in place within the organisation and member organisations could require that decisions deliberately consider the strategy and whether the recommended course of action is contributing to its implementation (Kippenberger 1998).

While the number of processes discussed in relation to strategy seem intimidating, it is likely that many of them occur naturally as part of the everyday activities of the organisation. Awareness of the processes and consideration of how they contribute to strategy formulation and implementation offers an opportunity to improve their usefulness. Rather than be prescriptive about how the processes should apply, this study recognises that processes should be appropriate for the particular context.

2.9.3 Output elements

In many instances, the various strategy processes combine to produce specific strategy outputs. For example, strategy formulation may combine knowledge generation, analysis and options evaluation to result in strategy outputs such as an organisational vision, long term plan, formal strategy document and implementation plan (Flavel & Williams 1996). While it is thought that the combination of processes and outputs can vary in number and form, this study considers the following identified output elements:

- vision;

- long term plan;

- formal document;

- ordered priorities;

- performance measures;

- actions with implementation responsibility;

- communication of strategy;

- completed projects;

- projects in progress; and

- allocation of resources to projects.

A vision is a tangible and communicable output that assists the organisation to develop a shared understanding of the organisation's purpose (Bones 2005). This concept is defined as 'the ideal future state of the organization, the position that is intended to be achieved at a certain time horizon' (Wilkinson & Monkhouse 1994, p.17). The vision is the ultimate goal towards which the organisation is striving. This must be appropriate to the organisation and the context, clearly communicated to organisational stakeholders and the leaders of the organisation must be committed to it (Dvir, Kass & Shamir 2004). The benefits of a clear vision are that it provides direction, continuity, shared meaning and inspiration (Bhide 1986; Dvir, Kass & Shamir 2004; Eccles & Nohria 1998; Hodgkinson 2002). A regional organisation may develop a vision for the region, rather than for the organisation itself. A regional vision is only appropriate if the vision is worded to recognise the ability of the organisation to influence that desired future. In order to gain the desired benefits of having a vision, it must be perceived as achievable and having meaning (Timms, Clark, Bond, McCartney & Stewart 2005).

As the vision relates to the highest level of organisational goals (Eigeles 2003), the approach the organisation intends to take to move towards the vision can be set out in a long term plan. A long term plan provides the necessary boundary setting, or direction for projects and initiatives within the organisation. This acts as a formal reference point for all members of the regional organisation and facilitates their decision making (Feurer & Chaharbaghi 1997; Flaherty, Jirovec & Allen 2002; Grant 2003; Sterling 2003). The long term plan plays a similar role to that of policy in Davies' work (2000) – it identifies the high level goals and objectives of the organisation and describes the domains in which it will operate. In order to provide this direction, the plan should include any core values, policies and goals the organisation has agreed to that are not

expected to change over the short to medium term. This boundary setting is quite prescriptive and if it is to be followed, must provide a basis for meaning and passion (Dvir, Kass & Shamir 2004). If it does not, the process will not encourage the organisation to answer the hard questions, but will allow them to sit on the fence, or try to please all of their stakeholders at once with a broad brush approach (Sterling 2003). A prescriptive, meaningful, long term plan also helps prevent immediate demands (rather than a future vision) from dominating the organisational direction (Plein, Green & Williams 1998) because it is not so easily dismissed.

The need for shared understanding applies equally to short and medium as well as long term goals. As with the long term plan, the goals and strategies behind the plan need to be clearly stated in a formal document so the various parts of the organisation and member organisations can see what each other are working on and hopefully support them (Pammer 1998). However, as stated in section 2.6.3, an organisation's strategies must also be flexible. This combination of formal recognition and flexibility can be provided by increasing the review and update opportunities for the formal strategy document and creating a living strategic plan. Such a document clearly articulates agreed strategies that are current at the time of viewing and (in order to achieve this) is regularly amended to reflect realised, modified and new strategies as they are agreed, in recognition of the changing nature of an organisation's priorities (Brews & Hunt 1999; Gillespie 2004; LaHay & Noble 1998; Love, Bunney, Smith & Dale 1998).

While priorities can change in response to dynamic external environments, they must still be present and clearly understood by implementers. Priorities guide (for example) the assessment of opportunities and threats, or a change in allocation of resources so the organisation is always putting effort into strategies that contribute most towards its long term goals (Miller, Wilson & Hickson 2004). Without a clear sense of priorities, the

organisation can spend valuable time and resources working on a wide range of projects that do not really move the organisation forward (Sterling 2003).

In determining if the organisation is advancing strategically, a set of performance measures should be developed. While some practitioners argue that it is difficult to set measurable targets for economic development strategies, the need to do so is recognised (Sneyd & Rowley 2004). This is justified by the idea that 'You can't manage what you can't measure…[and] you can't measure what you can't describe' (Scholey 2005, p.12). Measures may be quantitative or qualitative but should be simple to use and able to be applied consistently over time to monitor trends. It is particularly important that the measures offer credibility to the organisation through being realistic but challenging. There is a danger that, in political environments, safe measures are chosen that the organisation knows it will achieve. However, the general community is cynical enough to recognise such measures when they are used (Eagle, Cooke & Rossi 2004) and their use may be interpreted to suggest that the organisation does not have confidence in its ability to achieve more challenging targets. Linking measures to specific strategies also allows an organisation to review where it is in the implementation process, whether the strategy is achieving expected outcomes and what adjustments might need to be made to reach the end goal (Freedman 2003; Okumus 2003). The review is depicted in the strategy model presented in figure 4 (p. 57) where strategy performance is fed back into the strategy formulation process (Kippenberger 1998).

The process needs to include the allocation of implementation responsibility for all strategies (Flavel & Williams 1996). The organisation should either develop an implementation action plan, or some process that provides a link between the planning that is done and the work undertaken by the organisation and its members. The plan

must also include timing, budget and performance measures so that all expectations are clearly set out.

Successful implementation relies on effective communication of the strategy, as many strategies have been thought to fail as a result of a limited understanding or a lack of implementer buy-in (Inholfe Rapert, Velliquette & Garretson 2002; Sterling 2003). This communication should be two way communication between parties involved in developing the strategic direction and those implementing specific strategies (if they are not the same). Enabling implementers to question and provide feedback on the strategy encourages ownership and understanding of their role in its implementation (Aaltonen & Ikavalko 2002).

Strategy implementation itself provides outputs that can be measured. These may include projects that have been completed, projects in progress or the commitment of resources to implementation of specific strategies. As the primary outputs of the implementation phase, these projects encompass elements most commonly associated with strategy implementation or realisation.

2.9.4 Characteristics of processes and outputs

When discussing strategy processes and outputs, it becomes apparent that there are some common characteristics that are desirable across elements. These items are discussed with reference to elements identified in sections 2.9.1 to 2.9.3. The characteristics of processes and outputs are:

- realism;

- relevance;

- clarity;

- creativity;

- consistency; and

- complementarity.

A sense of realism is essential throughout strategic processes, because it ensures the effort spent on visioning and planning will have some application to practice. For example, if a regional organisation agrees on an objective, but then finds stakeholder or resource constraints limit its ability to achieve the objective, it is most likely that the objective is not realistic (Campbell & Alexander 1997). Organisations can benefit from being aware of the factors that might limit strategy effectiveness or their ability to fully implement a strategy before settling on it (Munive-Hernandez et al. 2004; Suutari 1999; Tsiakkiros & Pashiardis 2002).

A strategy that is perceived as being realistically achievable is more likely to have relevance to implementers (Hamel & Prahalad 1989). Relevance is important because: 'Implementation is operational in nature and relies on a series of daily activities performed by employees at all organisational levels' (Chimhanzi 2004, p.75). Strategy is often perceived as something only relevant to senior management, but because of the implementation components, it should be and is usually behind all work done by the organisation (Sterling 2003). If day to day pressures mean that effort is being given to something that is not consistent with the direction set in the strategic plan, it may mean that the plan is not relevant. Strategy needs to be linked to what people are doing to the extent that it becomes integrated into their operations rather than being something additional they do not perceive as an essential part of their job (Eagle, Cooke & Rossi 2004).

There must also be clarity in strategy processes and outputs. This relates to effective communication in that the way in which strategies are communicated must not leave room for different interpretations to be possible (Eccles & Nohria 1998; Ensign 1998). A shared understanding of processes ensures all players have an opportunity to determine when they should contribute to strategy formulation and implementation for maximum impact. One way in which strategies may lack clarity is if their vision is too general, as discussed in section 2.9.3. If it is not clear enough to be visualised, it will not be able to serve as a guide to the organisation. The same applies to strategies and implementation plans – implementers must understand precisely what it is they have to do (Worrall, Collinge & Bill 1998). Measures must be clear so that the same items are being measured every time, even if a different person is doing the measurement.

Creativity increases the opportunity available to the organisation (Cook 1998). It might be applied at the visioning stage, to develop a vision different than for any other region, or it might be useful to generate a range of options to choose between when formulating strategy, it might offer ways to implement strategies despite limited resources. Creativity can even be applied to processes (Cook 1998) by exploring different mechanisms for bringing key players together to consider strategy. Where an organisation has been operating for some time, or where there are a number of similar organisations applying the same strategies, there may be a danger of the organisation losing a strategic advantage (Cook 1998). Creativity in this instance could include challenging why things are being done in the way they are and considering alternatives (Olsen & Haslett 2002). It is very important that processes allow and encourage creativity.

While creativity increases strategic opportunities (Cook 1998), consistency is at the heart of strategy. As indicated in section 2.6.1, strategy is about applying a consistent

approach to achieve a goal. Therefore if an organisation does something once, it is not a strategy. It may be a project, but in order to have a strategic value it would need to relate back to some consistent approach. Decisions that are made need to be consistent (Harrison & Pelletier 2000), options evaluation processes should consistently consider the vision and long term goals of the organisation, resulting strategies should be consistent with objectives (Flavel & Williams 1996) and performance measures should be consistently applied. Where an organisation experiences a high degree of turnover of staff or members, consistency of processes can help minimise the disruption to its forward progress. Also, in order to achieve long term goals, consistency of strategic processes can be useful. When processes are applied consistently, there is less chance of the organisation's attention being diverted from strategy implementation by conflicting activities (Aaltonen & Ikavalko 2002).

Complementarity refers to how well new decisions relate to the strategic focus. Given that 'strategy consists of simultaneous, complementary themes' (Kaplan & Norton 2004, p.13), an organisation's activities should complement each other. Internally, emergent strategies should be complementary to initiatives already in place. Externally, decisions made by member organisations should complement the regional strategies. A lack of complementarity could see conflicting actions occurring, which would impact negatively on implementation effectiveness (Chimhanzi 2004). The concept of complementarity is particularly relevant to collaborative organisations. As collaboration allows for partners to maintain different objectives outside the joint project, there is a possibility of conflicting or competing actions. Complementarity suggests that achievement of strategy can be helped or hindered by the actions of collaborative partners. Strategy processes need to take this impact into account in order to be realistic and relevant.

2.9.5 Summary of theoretical framework

By considering elements of the strategy process individually, it is possible to search for them individually in the regional context. Figure 5 presents the full theoretical framework to be used for field work. This framework will influence the choice of methodology, which will be discussed in detail in chapter 3.

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┌─────────────────────────────────────────────┐
│ **Organisational factors**                   │
│  •  leadership                               │
│  •  shared understanding of purpose and goals│
│  •  member to member relationships (including│
│     communication)                           │
│  •  clarity of roles and responsibilities    │
│  •  involvement of implementers in strategy  │
│     formulation                              │
└─────────────────────────────────────────────┘

┌──────────────────────────┐      ┌──────────────────────────────┐
│ **Processes**            │      │ **Outputs**                  │
│  •  knowledge generation │      │  •  vision                   │
│     and sharing          │      │  •  long term plan           │
│  •  analysis             │ ───▶ │  •  formal document          │
│  •  options evaluation   │      │  •  priorities               │
│  •  recognition of       │      │  •  performance measures     │
│     emergent strategy    │      │  •  actions with             │
│  •  strategy and progress│      │     implementation           │
│     review               │      │     responsibility           │
│  •  reference to         │      │  •  communication of strategy│
│     strategy/guidance of │      │  •  completed projects       │
│     decisions            │      │  •  projects in progress     │
│                          │      │  •  allocation of resources  │
│                          │      │     to projects              │
└──────────────────────────┘      └──────────────────────────────┘

┌──────────────────────────────────────────────┐
│ **Characteristics of processes and outputs**  │
│  •  realism                                   │
│  •  relevance                                 │
│  •  clarity                                   │
│  •  creativity                                │
│  •  consistency                               │
│  •  complementarity                           │
└──────────────────────────────────────────────┘
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Figure 5: Theoretical framework

2.10 Conclusion

This chapter discussed literature on regions, organisations, collaboration and strategy
and moved from a general understanding of the topic to the development of a detailed

theoretical framework to facilitate the process of addressing the research questions. The modular structure of regional organisations was identified and described as contributing to the complexity of the management and study of such organisations. The concept of collaboration was found to be applicable to a consideration of relationships operating within the organisation.

When strategy was explored in relation to regional economic development organisations, an inconsistency was found between the confident perspective of the organisations' Chief Executive Officers and the cynicism of communities regarding the extent that strategic plans were implemented. A review of other studies identified a lack of specific information on strategy and implementation processes within regional economic development organisations. To address this need, the aim of the research was identified as to explore and describe strategy processes and the extent of strategy implementation in regional economic development organisations. Research questions were formulated that included examination of the extent stakeholders are involved in strategy implementation, questioning the way stakeholders perceive strategic planning, exploring what elements of strategies relate to implementation, and determining whether emergent strategies were incorporated into implementation plans. A desire to describe how strategies are documented, and whether regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal, was also identified.

The exploration of these research questions was initiated through the development of a theoretical framework of twenty seven strategy elements. The framework addressed organisational elements thought to facilitate collaborative strategy development and implementation, process elements encapsulating key aspects of planned and emergent strategy, output elements identifying important deliverables, and characteristics of

processes and outputs that may contribute to stakeholder involvement in strategy implementation. The application of this framework through a research methodology will be discussed in chapter 3.

CHAPTER THREE

3.0 METHODOLOGY

3.1 Introduction and research design overview

A review of the literature has resulted in the development of a detailed theoretical framework to guide examination of strategy processes as they occur in regional economic development organisations. To progress the study from the research questions identified in section 2.8.1 to conclusions about those questions, a plan of action is required that identifies how the researcher will apply the framework to the field (Yin 2003). This chapter will present an overall research design that applies semi-structured interviews and a document search to undertake case studies of strategy processes in Queensland regional economic development organisations.

3.1.1 Research intent

The overriding motivation behind this study is to explore and describe strategy processes and the extent of strategy implementation in regional economic development organisations. This information is expected to be useful as the basis for future research and the development of tools and models to assist such organisations to apply strategy. The study followed previous research (Dore & Woodhill 1999) in recognising that the current climate of regional economic development sees individual regions crafting and applying their own reactions to circumstances. This research aims to identify the processes resulting from those reactions.

The study's place in the development of theory is as an explorer – beginning to develop an understanding by confirming which elements of the strategy process suggested by

literature apply to regional economic development organisations (Sekaran 2003; Zikmund 2003). In locating these elements within regional organisations, there is an opportunity to describe how they appeared and what characteristics they displayed (Sekaran 2003). This is illustrated through the exploration and description steps in a basic sequence of research objectives (Blaikie 2000), presented in figure 6.

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┌──────────────┐      ┌──────────────┐      ┌──────────────┐      ┌──────────────┐
│              │      │              │      │  Explanation │      │  Prediction  │
│  Exploration │ ──►  │  Description │ ──►  │              │ ──►  │              │
│              │      │              │      │              │      │              │
└──────────────┘      └──────────────┘      └──────────────┘      └──────────────┘
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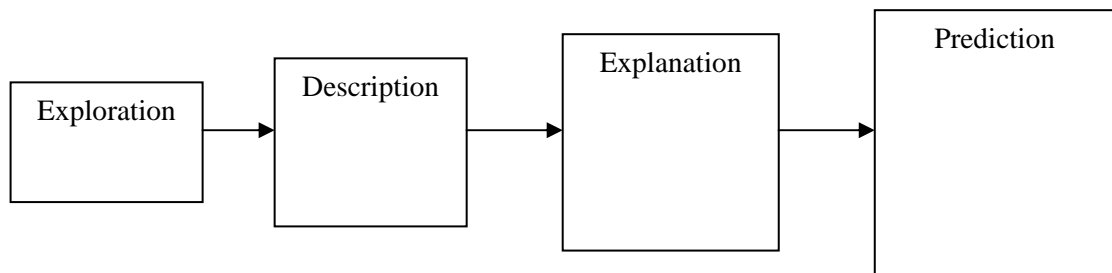
Figure 6: Sequence of research objectives (developed from Blaikie 2000, p.82)

Section 2.7 has shown that little research has been undertaken to date on the strategy processes and implementation efforts of regional economic development organisations. Given that limited theory exists, the aim of this study was to help build knowledge on strategy in regional economic development, and this involved an exploratory approach (Sekaran 2003; Zikmund 2003). Exploration was more appropriate than explanation or prediction due to the identified lack of knowledge on this topic. When undertaking explanation or prediction, a researcher needs to know which variables are present to apply to hypotheses about relationships and predicted behaviour.

By confirming particular regional strategy and implementation variables and providing a detailed profile of the context in which they occur, this study provides a basis for more advanced research. At its conclusion in section 5.3.4, statements about relationships between variables are suggested, which could be explored through further explanatory research. This may ultimately lead to theories and/or models being developed that

suggest strategy processes to increase implementation effectiveness. With these possibilities in mind, section 5.7 includes directions for further research.

3.2 Case study approach

The theories and models that could be developed as a result of this study would relate to a particular context – that of regional economic development organisations. In keeping with the need to start constructing models of the strategy processes as they occur within these individual organisations, this research applies a case study approach. Not only does this allow a detailed focus on particular regional organisations' strategy processes, but it makes it possible to look closely at specific elements of the process without having to separate them from the context (Hyde 2000; Patton & Appelbaum 2003; Rao & Perry 2003; Reige 2003; Remenyi, Money, Price & Bannister 2002; Yin 2003). This examination facilitates conclusions that address whether elements appear to be present, and also in what form and to what extent they occur. This would have been far more difficult with a research approach that considers elements independent of their context, such as a survey or experimental research (Yin 2003).

A cross-sectional - rather than longitudinal or historical - approach was selected as the research was interested in regional strategy processes currently applied (Blaikie 2000). This is also termed a one shot case study (Stake 2000), which highlights its exploratory nature. However, should a longitudinal perspective be desired in the future, the Case Study Protocol (Yin 2003) provided at Appendix A and discussed in section 3.4 provides sufficient detail to allow replication.

A number of different methods of applying the case study approach are available to researchers. Two accepted approaches are Glaser and Straus' grounded theory approach and Yin's case study method (Glaser & Strauss 1967; Voss, Tsikriktsis & Frohlich

2002; Yin 2003). Perhaps the greatest distinction between the two is that grounded theory primarily utilises induction, where field research is undertaken prior to development of a theoretical framework (Glaser & Strauss 1967; Hyde 2000; Leonard & McAdam 2002), while Yin's approach is more suited to deductive research, prescribing a detailed theoretical framework (if not propositions or hypotheses) prior to conducting field work (Yin 2003). This study follows Yin's deductive case study approach.

3.2.1 Use of theory

An understanding of theory is useful to the development of a research design when undertaking case study research (Yin 2003). A review of literature and previous studies was conducted on collaboration, regions as organisations, strategy and Australian economic development and led to the formulation of a theoretical framework for testing in Queensland regions. This framework, presented in section 2.9, proposed twenty seven elements of the strategy process. In order for future research to develop hypotheses relating to the effectiveness of regional economic development strategy processes or the impacts of this particular context on strategy, the presence or absence of these elements in regional organisations needed to be confirmed. The deductive approach in this study tested the theoretical framework (Ali & Birley 1999; Blaikie 2000; Hyde 2000; Sekaran 2003) by seeking evidence of the presence of each of the elements. Further rich, descriptive data was derived by considering the form and context in which the elements were found. This exploratory research helped to identify what variables were present and could be used in future research.

3.2.2 Case study method

The case study method described by Yin (2003) provided a useful outline for methodology planning within this study. Yin's approach, presented in figure 7, can be summarised into the following key steps: 1) develop theory; 2) select cases; 3) design the data collection protocol; 4) conduct individual case studies; 5) write individual case study reports; 6) draw cross-case conclusions; 7) modify theory; 8) develop policy implications; 9) write cross-case report. As the theory has already been developed in section 2, this discussion will proceed to step 2) select cases.
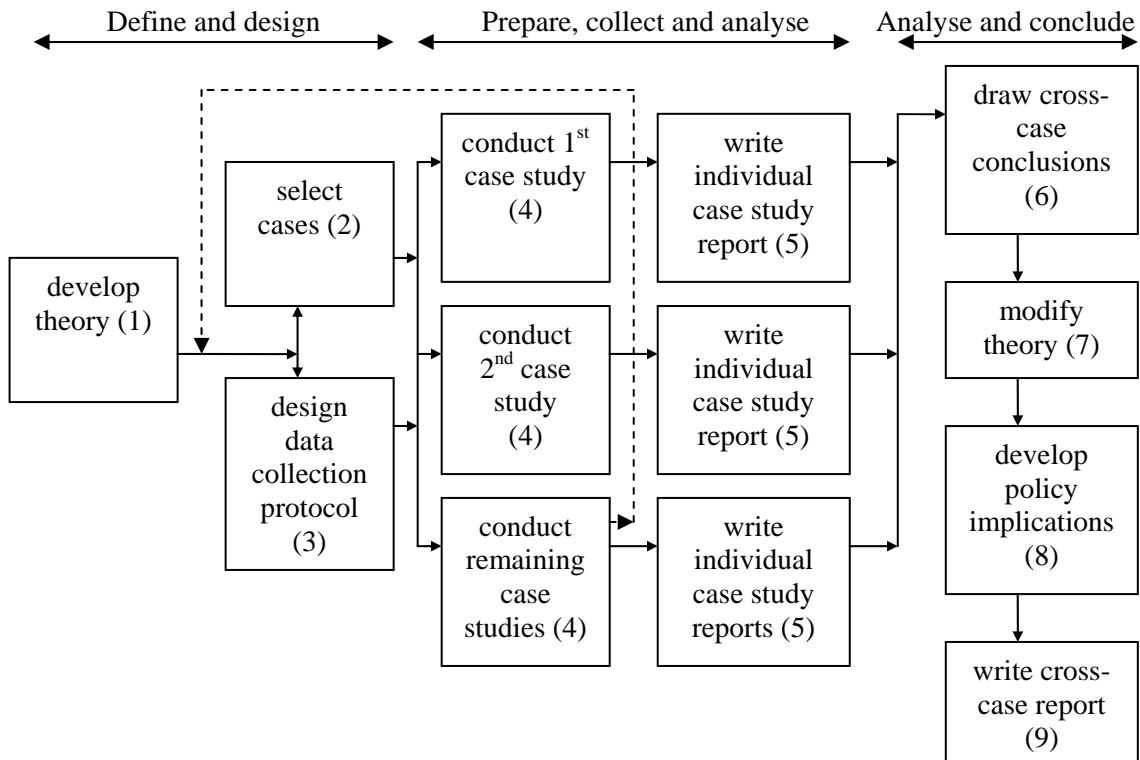
Figure 7: Case study method (Yin 2003, p.50)

3.3 Case selection

Cases were selected during the design stage of the study because of the potential influence on the utility of the study. Case selection not only provides a means of ensuring a focused study (through identification of boundaries), but it also impacts on

analytical generalisability. This section provides an explanation for the selection of cases, including a discussion on replication and boundaries. It also presents a profile of the case study organisations that agreed to participate in the study.

3.3.1 Replication

The selection of cases involves consideration of options such as: single case or multiple; holistic or embedded; and literal or theoretical replication (Yin 2003). While a multiple case design was desired due to the greater confidence this would provide to conclusions of the study, time constraints and the complexity of the theoretical framework restricted the scope of the study by allowing that only a small number of cases could be investigated. On this basis, the study features a multiple case design applying literal replication, where similar results were predicted for each case (Yin 2003). The two areas of interest (strategy processes and evidence of implementation) suggest the design is embedded and is therefore type 4 in figure 8 (Yin 2003).

	single case designs	multiple case designs
holistic (single unit of analysis)	Type 1 not replicated	Type 3 literal replication OR theoretical replication
embedded (multiple units of analysis)	Type 2 not replicated	Type 4 literal replication OR theoretical replication

Figure 8: Case study designs (modified from Yin 2003, p.40)

The attractiveness of literal replication is that, while similar results are predicted and desirable, dissimilar results will still be of use for future research (Yin 2003). While similar results have been interpreted to confirm the presence or absence of particular elements, dissimilar results were useful in considering potential relationships between elements and context. This is consistent with the purpose of exploratory research (Sekaran 2003).

The usefulness of study findings can in part be assessed by their generalisability and this is linked to the external validity design test identified in section 3.7 (Reige 2003). While case studies are typically thought to be limited in terms of their generalisability (Blaikie 2000), this principally refers to the concept of statistical generalisation (Johnston, Leach & Liu 1999), which is a generalisation to a broader population (Hyde 2000; Yin 2003). Literal replication allows generalisation to theory (termed analytical generalisation), which is distinct from statistical generalisation. Ensuring maximum analytical generalisation helped the study to meet the external validity design test. Given that the aim of replication is to predict similar results, the way to robustly test this is by selecting cases that are as different as possible. This makes similarities of results more significant and suggests a further exploratory study if dissimilar results are obtained.

The selection of cases for particular characteristics is termed purposive or judgement sampling (Blaikie 2000; Zikmund 2003). It encourages the identification of cases that are thought to contribute most to theory by highlighting elements that are present despite significant changes in the context (Johnston, Leach & Liu 1999; Punch 1998). While this was the principal aim of sampling for this study, some compromises needed to be made for resourcing reasons. The broad population of potential cases from which to purposively select was first narrowed geographically to facilitate selection of cases

that were convenient to the researcher (Sekaran 2003). This distinction involved Queensland, non metropolitan regions within 750km of Rockhampton.

This frame contained a number of potential cases, too many for all to be covered. When selecting which cases to focus on, it is first important to know how many are desirable and possible within the constraints of the study (Yin 2003). As an exploratory study, where the level of certainty required was limited to identifying variables present with some degree of confidence in order to assist further study, three cases were deemed sufficient (Yin 2003). Consistent with the aim of the study, the decision was made to undertake three cases to a high degree of detail, rather than provide a more shallow description for a greater number of cases.

3.3.2 Selection of cases

A clear process was designed to assist in the selection of the most useful cases, and to define the boundaries that identified what an individual case was (Cutler 2004; Punch 1998). This process is related to the theoretical framework developed in chapter 2, and applied key concepts to gradually narrow down the focus until individual cases were identified. The filtering process used to selected cases is depicted in figure 9.
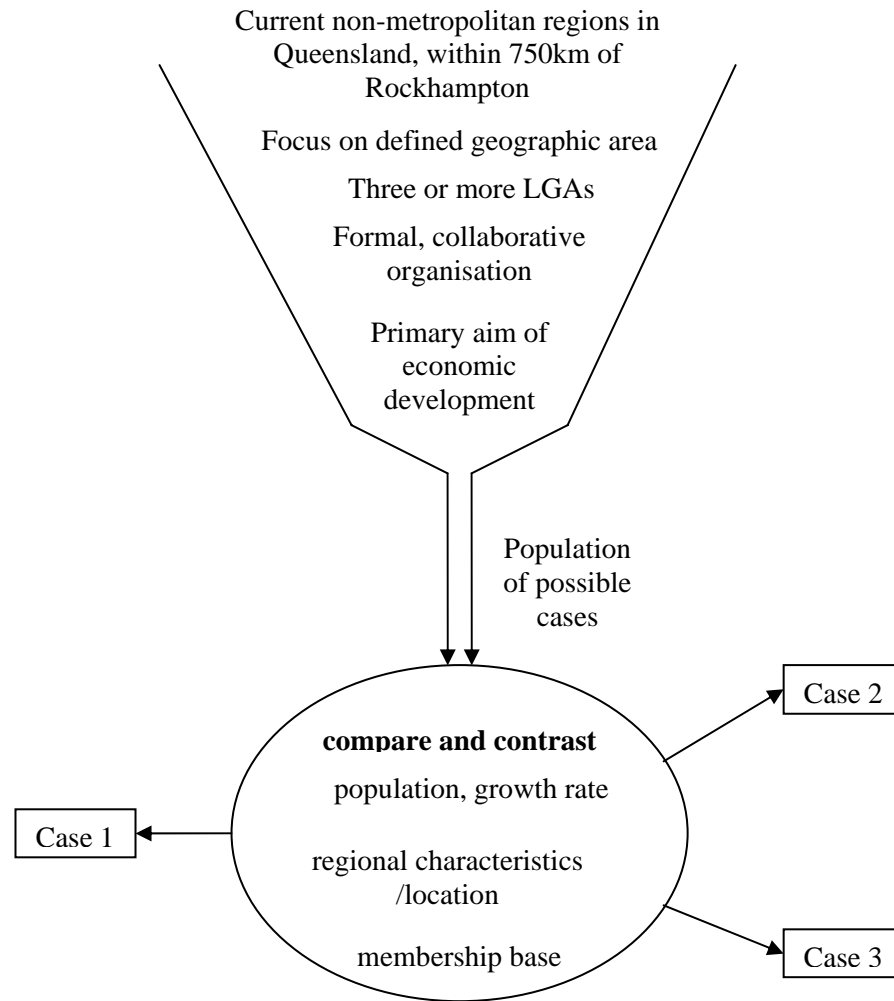
Figure 9: Process for selection of cases

The theoretical framework identifies the general area of interest being examined by the research and, therefore, the general context from which cases were selected. The study related to contemporary issues, so all cases needed to be current. Considering the constraints identified in section 3.3.1, this study area was narrowed to Queensland, non-metropolitan regions within 750km of Rockhampton. Applying the next stage of the theoretical framework led to the second criterion – a region must relate to an identified geographic area.

The general scale of regions identified in section 2 is an area between that of state and local government jurisdictions. For practical purposes this was interpreted as an area

that incorporates a minimum of three local government areas. This allowed for the concept of collaboration on shared outcomes at local government level as well as individual businesses and communities. Therefore, the third criterion was that the identified region must incorporate a minimum of three local government areas.

Consistent with the definition of a regional organisation provided in section 2.4, the fourth criterion required that a case relate to a formal organisation that consisted of a group of stakeholders sharing a common interest and combining efforts with respect to an identified geographic area. The interest in collaborative organisations also meant that preferred cases should have more than one funding source. The resulting population of cases involved organisations interested in environmental, social and economic development. However, these organisations differ in their history and reason for being and this was expected to flow through to their strategy processes, adding a complexity not desired for this study. This research is particularly interested in regional economic development and the fifth criterion, therefore, limited cases to those organisations whose principal aim is economic development.

These five criteria were applied to produce a study population of eight cases. These were: Burnett Inland Economic Development Organisation (BIEDO); Central Highlands Development Corporation (CHDC); Central Western Queensland RAPAD (CWQRAPAD); Dawson Valley Development Association (DVDA); Gladstone Area Promotion and Development Limited (GAPDL); Mackay Whitsunday Regional Economic Development Corporation (MWREDC); Rockhampton Regional Development Limited (RRDL); and Townsville Enterprise Limited (TEL).

From this population, it was desirable to select a set of three cases that differed significantly in their context. The theoretical framework was again applied, this time to understand the differences between various regions and regional organisations. Section

2.5 states that regions experience different challenges related to their location (rural or urban), population characteristics (size and growth), economic base (diverse or single industry dependent), location and environment (coastal or inland) (Armstrong 2003; Fulop & Brennan 2000; Gleeson & Carmichael 2001; Stehlik 1999). These considerations were addressed by comparing regions on the following criteria: location; population; and population growth rate. The regional organisations differed in terms of the number of member organisations involved and the diversity of power bases and outcomes desired from collaboration (see sections 2.3 to 2.4). These factors were addressed by considering the characteristics of the organisation's membership base.

As depicted in figure 9 (p. 81), the study population was compared and contrasted on the criteria of population, population growth rate, regional characteristics and location and membership base. A set of three preferred cases was selected with the maximum possible variance. Alternate cases were also identified in case preferred cases were not willing to participate in the research.

Two cases initially identified as preferred cases declined involvement in the project and the alternate cases were approached. The reasons for declining participation differed. One preferred case study organisation indicated that staff were too busy to assist with the project. The other organisation felt that its processes were very innovative, and did not wish to be involved in the research unless the project would result in positive recognition of the organisation for those processes. This was felt to threaten the integrity of the study by discouraging recognition of any aspects that might not show the organisation in a positive light.

3.3.3 Access to cases

The process followed to access cases is illustrated at figure 10. Once the purposive sampling approach was applied (as per section 3.3.2) the identified cases were checked for their accessibility. A prime contact, or person within the region who was thought to be best able to facilitate the conduct of the case (Voss, Tsikriktsis & Frohlich 2002), was identified. This person was the Executive Officer or General Manager of the regional organisation. Contact was initiated with this person to establish whether the organisation supported the research. As the initial response from two cases was negative, alternative cases were pursued satisfactorily in the same manner. Participation was gained from three cases.

Figure 10: Process for confirmation of cases and informants

Once a supportive initial response was received, a suggested interviewee list was requested so that potential informants could be identified (Wengraf 2001). Within the range of organisation stakeholders, a representative number of informants needed to be identified. Given the time involved in undertaking interviews and the potential difficulty in accessing a large number of informants for each region, a target of six

interviews for each region was set, subject to accessibility. The Executive Officer or General Manager of the organisation was an essential informant for each case.

Identified informants were contacted by email (with a follow up by telephone) to determine their willingness to participate. Information was provided to outline the purpose of the research and why they might like to be involved in the project. As detailed information might influence the responses of interviewees, only brief framing information was provided (Wengraf 2001). It was desirable that informants had not prepared for the interview (not studied strategy material in advance as this study was interested in identifying levels of awareness), however, informants ideally must have had some involvement in organisational decision making or the strategy implementation process. All informants approached to participate in the project consented and data collection was arranged.

3.3.4 Final cases

A comparison of the final case organisations is presented in table 3. The organisations varied on a number of factors, the key ones being the size of the area covered by the organisation, the population within the region and the number of organisation members. One case organisation incorporated twice as many local government areas than the other two and another had been established for significantly longer than the others. While the sampling approach was convenience rather than purposeful, the final set of cases displayed strong diversity as originally desired.

Table 3: Summary of selected cases and informants

	Case 1	Case 2	Case 3
Regional factors			
Area (km^2)	64,005	26,243	90,340

Population (2004p)	19,997	64,092	143,699
Building Approvals (June 2005, $m)	39.6	149.5	523.4
Mean taxable income (2002/3, $)	44,295	42,044	39,690
Number of Local Government Areas within region	4	4	8
Regional organisation factors			
Year established	1997	1981	1999
Number of members	5	330	46
Membership base	Local government, major corporate	State and local government, major corporate, local business	State and local government, major corporate, local business
Number of interviews	6	6	6
Interviewees	Staff, Board members	Staff, Board members, other regional stakeholders	Staff, Board members, other regional stakeholders

Source: (Office of Economic and Statistical Research 2005; case study organisations)

3.4 Case study protocol

Consistent with Step 3 of Yin's (2003) case study approach identified in figure 7 (p. 77), this study applied a detailed Case Study Protocol (see Appendix A). The protocol identifies the specific methods used and explained how interpretation occurred and how conclusions were drawn from the data. Descriptions of methods, data collection procedures and data analysis tools are provided in sections 3.4 to 3.7.

3.4.1 Research methods

As this is an exploratory, descriptive study that is concerned with gathering evidence to determine the presence or absence of strategy elements, there was a need for a research method that could probe. It was necessary to follow leads, ask additional questions and

advance tentative propositions for agreement or rejection. Given the complexity of strategy and the number of different terms that were uncovered in the literature, the method required the ability to illustrate concepts so to share an understanding of the focus of questions with informants. The research tool providing the most flexibility in presentation and questioning is the face-to-face interview. Added benefits of this tool are the ability to create rapport and greater appreciation of situational factors (Sekaran 2003; Zikmund 2003).

An individual interview, however, is only a single conversation involving the researcher and one other person, where the information gained is subject to the biases of the participants (Voss, Tsikriktsis & Frohlich 2002). As the outcome of the interview is material that can be used to make inferences about the topic of interest (Wengraf 2001), these inferences are aided by additional material that can be contrasted with it, to either confirm or question what was identified in the interview. This concept has been considered in depth in research methodology literature and has been given the term triangulation (Jick 1979) or more recently, crystallisation (Janesick 2000). The four basic types of triangulation provided options for the design of this study: data triangulation, which uses a variety of data sources; investigator triangulation, which uses multiple researchers; theory triangulation, which applies theories from different disciplines or perspectives; and methodological triangulation, which uses different methodologies within the one study (Janesick 2000; Jick 1979; Mangan 2001).

All approaches to triangulation feature in this study, but to differing extents. Theory triangulation occurred in the development of the theoretical framework, by drawing together perspectives on collaboration, strategy, regional organisations and outcomes of past studies. Investigator triangulation was limited, but is embedded in the nature of this supervised study. Data and methodological triangulation form central features of

the research design, through a combination of data sources and methods of data collection and analysis.

Multiple data sources used include a document search and interviews with multiple stakeholders in each case. This ensured that elements of the strategy process were investigated from a number of perspectives, recognising the likelihood of subjectivity and bias within data sources. Use of multiple data sources provided increased confidence in conclusions about the presence or absence of elements (Bonoma 1985) and is consistent with other case studies that examine processes (Faerman, McCaffrey & Slyke 2001; McLarney 2001). The document analysis sought to verify what interviewees were claiming (Johnston, Leach & Liu 1999). As items developed outside the research process, documents can be considered as relatively independent (Johnston, Leach & Liu 1999). The document analysis was also important as a stand alone method of establishing the presence of particular elements of the strategy process that were documentary in nature. Additional breadth and depth was added to the data gathered through the approach of multiple interviews seeking the same information from different individuals, each with a different perspective.

Methods of data collection also related to the interview format. Given the starting point for this research was a detailed theoretical framework developed to focus the investigation and its analysis, the interview design needed to have a degree of structure to ensure all aspects of the framework were addressed. The semi-structured approach to interviews was selected, not just because it allowed coverage of a range of identified topic areas but because the open-ended aspect of the approach made it possible for unexpected data to arise and add depth to the study (Jarratt 1996). The richness gained from open ended questions within the interview (Reige 2003) is important in describing how the elements are situated within the particular regional context.

While open ended questions were useful during the interviews, there was also a need for consistency of questioning. By asking the same question of everyone, conclusions relating to an element under focus gained reliability (Voss, Tsikriktsis & Frohlich 2002). Neutral questions and probes were also formulated in advance to limit the possibility of interviewer bias compromising the path of inquiry (Lillis 1999). Given that 'the validity of survey data depends on shared understanding of questions and response options' (Adamson, Gooberman-Hill, Woolhead & Donovan 2004, p.140) preparation for the interview also involved operationalising the elements being investigated. This is addressed in section 3.5.1.

3.5 Data collection procedures

It was beneficial to plan how data would be collected prior to beginning that stage of the research. This focused effort, ensured consistency across cases and addressed how any challenges that might arise could be overcome (Sarantakos 2005). While the investigative nature of the study meant that some data analysis occurred concurrently with data collection (Sarantakos 1998), these items are discussed separately to allow a focus on each.

3.5.1 Operationalisation of theoretical framework

Given that the theoretical framework was applied as individual elements, there was a need to communicate various concepts in a way that informants consistently understood them. This was also particularly relevant due to the range of terms used within strategy, as discussed in section 2.4.1. The Case Study Protocol (Appendix A) includes a section that operationalises these elements by identifying in advance what the researcher would

accept as various definitions for each item. This ensures that should the research be replicated by another researcher, the interpretation of responses could still be the same.

3.5.2 Conduct of interviews

The case study reports did not require identification of specific informants, so anonymity was offered to interviewees (Perry 1998). Generic descriptions relating to interviewees as members of the organisation were only used in cross-case analysis, meaning that readers cannot tell with any certainty which informant provided the information. No demographic data was collected from informants, because the focus is on the overall organisation's strategy processes not on individual perceptions of it.

Desired outcomes for each interview were the same, therefore, one general structure was developed and applied to all. As they were semi-structured with some open questions and discussion, interviews did not progress in exactly the same manner, however, the same questions were covered by each (as discussed in section 3.4.1). To facilitate this consistency, clarification of concepts was also consistent through the use of the same definition to explain strategy. Interviews were recorded so that transcripts could be searched to verify this consistent interpretation.

3.5.3 Conduct of document search

A list of generic document types was included in the Case Study Protocol (Appendix A) to provide a starting point for the document search. Initial location of documents occurred through a search on the internet, followed by requests to informants during interviews and a follow up with the regional organisation. It was desirable to have good coverage of the documents prior to interviews as this assisted the researcher to probe answers that were inconsistent with their content or to explain the documents further

and where they originated from. Where documents had not been found prior to interviews, informants were often able to direct the researcher to them or provide them. However, there was a concern that asking about the documents prior to interviews might have encouraged informants to refresh their memories as to the contents and this could have changed some of the responses to questions aimed at establishing familiarity with items such as the vision.

The range of documentation reviewed included anything that related to the purpose and role of the organisation, its membership, projects, and core processes. Documents that identified the projects of member organisations or their involvement in the regional organisation were also sought. This included corporate plans, strategy and implementation documents, annual reports, budget statements, meeting minutes, promotional documents, terms of reference documents, web pages and discussion papers.

3.5.4 Collation of data

Data collection produced a large quantity of written material. To establish an audit trail and facilitate analysis, this material is held in a study database and ordered by individual case (Perry 1998; Yin 2003). The researcher kept a running commentary on the field work, in a field text (Voss, Tsikriktsis & Frohlich 2002). This includes: contact records, email and other correspondence, transcripts and interview notes. Documents collected as part of the field work are included in the bibliography so that readers can see on what conclusions have been based (Yin 2003).

3.6 Analysis of data

As the research design specifies how data will be collected, it was also important to develop a plan for analysis of this data so that the study continued to progress once case study data had been collected (Yin 2003). In order to retain the integrity of the regional context by seeing cases as whole entities, data analysis focused on within-case analysis before moving to cross-case analysis (Perry 1998; Punch 1998; Voss, Tsikriktsis & Frohlich 2002). This is consistent with Yin's (2003) case study method outlined in section 3.2.2, where Step 5: Write individual case study reports; precedes Step 6: Draw cross case conclusions.

3.6.1 Within-case analysis

Each individual case was considered as a single unit with its own case study report that presents a description of strategy as it occurs in the region. This is where a case was used to describe what is occurring in regional development organisations (Remenyi et al. 2002). The story was constructed through within-case analysis that considered the theoretical framework and led to conclusions at the end of the case regarding which elements were present and which were absent. This report was provided to the Executive Officer/General Manager of the relevant regional organisation to check conclusions and identify any areas where the researcher's perception differed significantly from theirs. The case reports are summarised in section 4.3 and attached as Appendix B.

A table was prepared for each case that listed the identified strategy elements and recorded the results from each interview by element. This included separate notes on the evidence for and against each element (Voss, Tsikriktsis & Frohlich 2002). Where

informants agreed on the presence of an element, and/or where documentary evidence existed, a positive answer to this question was concluded.

In a number of instances some informants suggested an element was present and some disagreed. In some instances documentary evidence was enough to conclude that the element was present. Where there was no documentary evidence, but informants disagreed on the presence, the conclusion was that the element was present in part. Where no informants identified a particular element as present, the researcher reviewed documentary evidence and interview transcripts to confirm the conclusion. In all cases, data was identified to describe the form and extent of strategy elements, or a reason for the absence of particular elements.

The open ended interview questions resulted in information being provided on elements not identified specifically in the theoretical framework. When this occurred, transcripts were reviewed and a basic pattern matching approach applied (Jarratt 1996). Where enough evidence was found, the item was also acknowledged as a sub-element. Limited methodological triangulation occurred during the within-case analysis, through the deductive process of considering evidence contrasted with the inductive process of pattern matching. The purpose of this triangulation was principally to pick up something that may have been overlooked, rather than to deepen the overall analysis.

3.6.2 Cross-case analysis

Once the individual cases had been analysed, they were compared and contrasted using a series of tables to draw cross case conclusions and modify theory (to address steps 6 and 7 of the case study method at figure 7, p. 77). Each table contained evidence from each case as it related to the elements. These arrays were used for a general search for similarities and differences as well as comparisons of cases as a set of interrelated

elements (Voss, Tsikriktsis & Frohlich 2002). A comparison of the individual elements was undertaken to identify whether the same elements had been confirmed across different cases. This highlighted which elements were consistent across cases and which varied, taking into account the extent and form in which they appeared. Some initial reasons as to why this may be the case arose during this analysis, and are discussed in sections 5.2 and 5.3.

Patterns and similarities in contexts were identified to further investigate an element when insufficient evidence of its presence was found (Voss, Tsikriktsis & Frohlich 2002). In accordance with the within-case analysis, where elements were found to be present in a form not described in the theoretical framework, a detailed review of each case was conducted to identify if they appeared this way in more than one case. Where this occurred, the element was split into two sub-elements.

Elements were also grouped for comparison across cases to determine if there were any particular combinations of elements that appeared the same for all cases. While a focus was on combinations that addressed the research questions, other combinations were reviewed to determine if there were similarities not considered in the development of the theoretical framework. The cross-case analysis added depth to the study by systematically comparing and contrasting the individual cases and identifying patterns.

3.6.3 Drawing conclusions

After the case-based analysis was completed, the resulting information was used to draw conclusions about the research – specifically to describe strategy processes and the extent of strategy implementation in regional economic development organisations. Two approaches were used to reach conclusions related to the research questions: following and supporting the theoretical propositions; and seeking rival explanations

that challenge these propositions (Yin 2003). As exploratory research, conclusions were based on the broad scope of findings as well as implications for further study, including suggestions for exploration of relationships and application of models. These conclusions are presented in chapter 5.

3.7 Design tests

A research design is presented in this chapter as a possible way to answer the research questions posed in section 2.6.1. While it is agreed that there is never one right way to undertake research (Blaikie 2000), there are a number of design tests that can be applied to establish the effectiveness of the research. Four tests relevant to this study are construct validity, internal validity, external validity and reliability (Yin 2003). These are presented in table 4 along with tactics that were considered for use within the case study and the corresponding research phase.

Table 4: Case study design tests

Tests	Case study approach	Phase of research in which tactic occurs
Construct validity	• use multiple sources of evidence • establish chain of evidence • have key informants review draft case study report	Data collection
Internal validity	• do pattern matching • do explanation building • address rival explanations • use logic models	Data analysis
External validity	• use theory in single-case studies • use replication logic in multiple case studies	Research design
Reliability	• use case study protocol • develop case study database	Data collection

Source: Yin 2003, p.34

Construct validity asks whether the study enables unbiased conclusions to be drawn (Reige 2003) and relates to the appropriateness of the 'operational measures for the concepts being studied' (Yin 2003, p.34). Suggested tactics have been applied in this study – multiple sources of evidence as identified in section 3.4.1, compiling a chain of evidence through a case study database (discussed in section 3.5.4) and the process of seeking comments on the draft case reports from the relevant informant (section 3.6.1).

Internal validity relates to how credible the conclusions of the case study are as a result of the way in which analysis was undertaken (Reige 2003). This was addressed by the opposing questions on evidence of elements (section 3.6.1), the search for patterns (section 3.6.1) and the use of array tools to compare and contrast data, including with the theoretical framework. External validity relates to the degree of generalisability of the findings (Reige 2003) and was discussed in detail in section 3.3.2.

Reliability requires that consistency be applied to research methods (Reige 2003) and asks whether the study would produce the same results if replicated by a different researcher (Yin 2003). The Case Study Protocol (section 3.4) assists in addressing this by providing specific detail as to the research methods to be used. Also, the detail set out in the Case Study Protocol at Appendix A as well as the inclusion of structured questions in the interviews aims to facilitate ease of examination of the study methodology, reducing the danger of interview data accuracy being compromised by inconsistent techniques.

3.8 Ethical considerations

The study involved gathering information from people as representatives of organisations. All research was undertaken in accordance with Central Queensland University's Code of Conduct (Central Queensland University 2004), and clearance was obtained from the University's Human Ethics Research Review Committee prior to undertaking field work. The study embraced principles of free and informed consent, participants were anonymous, and participating organisations were offered the opportunity to review draft individual case study reports. No demographic information was collected in relation to individuals. The right of participants to withdraw at any stage of the project was recognised, and study results are accessible to all individuals

and organisations involved. Further, due to the exploratory nature of the study, no additional intellectual property considerations are expected to arise from participant involvement.

3.9 Conclusion

This chapter presented the research methodology applied to undertake case studies of Queensland regional economic development organisations. The design involved information being sourced from regions through semi-structured interviews and a document search. Within-case and cross-case analysis was described as a means to consider supporting and opposing evidence regarding the presence of elements of the strategy process. Design tests have been applied to the research design to encourage the best possible contribution to theory, and ethical considerations have been addressed to respect the study's human participants.

CHAPTER FOUR

4.0 RESULTS

4.1 Introduction

This chapter presents a description of the results of the data collection. These results are discussed in terms of the theoretical framework and elements described in section 2.9 and then a summary of each case. The discussion of results follows the research methodology in that it considers whether and how the prediction of similar results was met.

4.2 Absence or presence of elements across the cases

The absence or presence of organisational elements is summarised at the start of each section, with a '✓' representing presence, a '✗' representing absence and a 'p' representing a partial presence. An outline of the way in which elements were interpreted is provided in the Case Study Protocol at Appendix A. A partial presence was concluded when limited supporting data was found or significantly opposing views were identified in interviews. To provide greater accuracy in discussing cases, some elements were split into two, more specific, sub-elements.

4.2.1 Organisational elements

The presence of organisational elements is summarised in table 5. All three cases differed with respect to the elements and Cases 1 and 2 had more organisational elements in common with each other than with Case 3. Two elements were absent from all three cases: leadership on strategic planning; and a shared understanding of the specific goals of the organisation.

Table 5: Summary of organisational elements

	Case 1	Case 2	Case 3
Leadership			
regional leadership on economic development	✔	p	✘
leadership on strategic planning	✘	✘	✘
Shared understanding of purpose and goals			
general purpose of organisation	✔	✔	p
specific goals of organisation	✘	✘	✘
Good member to member relationships	✔	✔	✘
Clarity of roles and responsibilities	✘	p	✘
Involvement of implementers in strategy formulation	p	✘	✘

Leadership

The interviews identified two different aspects of leadership. These related to whether the organisation displayed leadership in terms of regional economic development or organisational strategic planning. The first aspect of regional leadership was a combination of the involvement and commitment of community leaders (particularly Mayors), the presence of other economic development bodies in the region, and the organisation's relationships with them. Case 1 enjoyed the commitment of all Mayors and Chief Executive Officers in the region and did not appear to compete with any other economic development bodies for regional leadership. Despite the organisational vision being 'Taking the lead', member organisations did not actively promote this leadership role in documents analysed for this case study, however, one interviewee thought members did regard it as such, stating: 'The priority is given because… it's their baby in a sense'.

Case 2 displayed a partial presence of this element, with the involvement of some (but not all) community leaders and a positive working relationship with one of the few economic development organisations operating within the region. An interviewee explained how this relationship worked:

I think that's been developed over a period of time and the good communication

that occurs in this region ensures that they know what we do, we know what they

do, we also know what we're good at, they know what they're good at.

This was not the same in Case 3, where some local governments within the region have elected not to be involved with the organisation and some communities have formed their own economic development bodies. One interviewee expressed a common view by stating: 'There are too many regional economic development organisations' and another said: 'Everybody thinks they're a leader'. However, one interviewee claimed that the organisation falsely promoted itself as a leader and suggested it deserved any criticism it received because it was not delivering.

While organisations differed with respect to regional leadership, the interviews and document analysis led to a common conclusion regarding the presence of leadership in relation to strategic planning – that it was absent in all three cases. While individuals such as the Chair of the Board, the organisations' General Manager or Executive Officer, and Board Members were thought to display leadership at various times, none were identified as initiating, driving and maintaining strategic planning processes.

Shared understanding of purpose and goals

This element involved identifying whether interviewees displayed a shared understanding of the purpose and goals of the organisation, reflected in two sub-elements: a shared understanding of the general purpose of the organisation; and a shared understanding of the specific goals of the organisation. A shared understanding of the general purpose of the organisation appeared to be present in Cases 1 and 2, and showed a partial presence in Case 3. The main difference was that in Case 3, some interviewees raised items that were not acknowledged by the majority, whereas in Cases

1 and 2, interviewees consistently used similar terminology. The following statement by one interviewee echoed general sentiments perceived across all cases:

> The direction in which we're travelling is an agreed direction. It's not as if you know, eight out of the nineteen think we should go that way and eleven think we should go the other way.

There were consistencies across the cases in terms of the general purpose of these organisations. They can be summarised into four categories: promotion of the region; enabling a coordinated approach to economic development across the region; providing services to Councils and businesses; and focusing on economic development issues, ideas and opportunities. An additional purpose identified in Case 3 was to serve as a clearing house for projects trying to access state government funding. In the wording used by an interviewee in Case 3, the purpose of a regional economic development organisation was:

> To provide a coordinated economic development approach across a broad region and to provide a capacity to respond or react to opportunities for economic development within the region.

When investigating the purpose of the case study organisations, it became apparent that the underlying concept of economic development was not clear. It seemed to depend on how individuals perceived economic development as to what the purpose of the organisation meant to them.   Some interviewees referred to macro and micro development, one pointed out a text on enterprise facilitation, a number of interviewees talked about growth (of the economy, business, jobs and populations) and one interviewee suggested that the person pumping petrol at the station was involved in economic development, but they did not know it. There seemed to be different views within and across cases as to the scope of economic development (whether or not it

included community development) and the appropriate way to approach it (top down versus bottom up). This was generally not acknowledged as an issue, although one interviewee stated: 'You can't get agreement out of nineteen people on what development is'. This diversity of views suggests that interviewees do not really agree on the purposes of the respective organisations in terms of their specific roles and goals in relation to economic development. The element of a shared understanding of the specific goals of the regional organisation is absent from all three cases.

Member to member relationships

The three cases differed in terms of how interviewees perceived relationships between members. Both Cases 1 and 2 were identified as having good member to member relationships and a presence of the element, with Case 1 standing out as particularly good. In the words of one interviewee: 'I was amazed at the level of trust and cooperation'. Interviewees in Case 2 were also positive, and trust was perceived as important:

> Because there's no way we'd walk into a partnership where you felt the partner
> was going to be taking over.

An examination of Case 3 revealed poor relationships overall and an absence of the element. Interviewees commented that they were shocked about the reasons for members being involved and that: 'To some extent, we're competing against each other. We should be working together.' This was coupled with a sense that the organisation was perceived as being too political and that certain interest groups had been able to push their own agendas.

Clarity of roles and responsibilities

The most important aspect that came out of data collection in relation to this element was the breadth of roles identified for the regional organisation. Interviewees and documents across all three cases identified a similar range of activities. These are summarised as: promotion and advocacy (including submission writing); coordination and networking; communication and referral; facilitation and brokering; training; project management; events organisation; pursuit of funding; provision of secretariat or administrative services; project initiation and feasibility analysis; research; and sharing of information and statistics. All of these activities were applied in relation to a broad array of projects, ranging from assisting a community group to develop a skatepark facility, to training women in small business, to upgrading an airport, to encouraging a farm forestry industry to develop.

Consistent with this broad range of activities was an acknowledged lack of community awareness of the role of the organisations. In Case 3, an interviewee concluded:

> Maybe that could be our problem. Of people not knowing what we do. Because we take on membership, we do these things for members, but really that's not what we're here to do.

Perhaps also contributing was the potential for confusion between the role of the regional organisation and other organisations within the region that might also consider development issues. An interviewee in one case listed five other organisations whose roles could be confused with the regional body. Further, all cases seemed to experience member organisations deliberately misinterpreting the role. An interviewee in Case 1 said:

> We try not to give [*the regional organisation*] projects that we really should be doing ourselves, but sometimes it's difficult when you see another member council getting a project on board when you think "We're doing it ourselves".

Clarity of roles and responsibilities included consideration of roles within the organisation as well as the role of the organisation itself. Internally, Case 1 had a specific issue with confusion over roles on the Board. As Councils were members and Mayors and CEOs both attended meetings, there were different opinions as to whether both positions were recognised as Directors or whether just the Mayors were. Interviewees acknowledged this issue and indicated that it would be raised and resolved at a future meeting. In Case 2, an interviewee questioned the use of the organisation's development committee to manage the implementation of activities, suggesting it should serve more of a role as an advisory group. Interviewees in Case 3 raised a number of points relating to internal roles. One interviewee questioned whether some Board members fully understood their role and took it seriously. Another suggested the role of the General Manager/ Executive Officer was not clear, stating:

> They're not just there to carry out the wishes of the Board. They're there to stimulate the Board and with the Board develop new procedures, strategies, projects, whatever, you know?

In summary, clarity of roles and responsibilities as an element was generally absent. Case 2 demonstrated a partial presence, related to a sense of internal roles and responsibilities being relatively well understood.

Involvement of implementers in strategy formulation

An interviewee identified why implementer involvement in strategy formulation was relevant:

In regional planning or strategic planning you must capture everybody's opinion. Because once you start to lock it in, and something comes along later on, they'll say "I was never really in favour of that to start with."

In the three cases, implementers were identified as organisation staff, member organisation staff, and sometimes others in the region. When asked about who was involved in strategy formulation, interviewees generally thought the Board and some community members were involved. With respect to member organisations, it seems as though the head of the organisation was generally involved in formulation, however, the actual implementers may have been staff lower down in the organisation.

In Case 1 strategy formulation involved a range of people, including a half day session with organisation staff. In this case the element is deemed to be partially present (not all Councils were involved at officer level). The element is absent in Case 2 as the strategic planning process did not involve organisation staff, and an interviewee thought the community could have been involved more. In Case 3, the two main implementers not only were not involved in planning, but also did not know who was involved. The element of implementer involvement in strategy formulation is not present in this case.

4.2.2 Process elements

There were a number of similarities in relation to the presence or absence of process elements across the three cases, as listed in table 6. As with the organisational elements, Cases 1 and 2 had more in common with each other than with Case 3. The interviews found that a number of elements applied differently to individual projects than the overall approach of the organisation. These elements were split into sub-elements to reflect that distinction.

Table 6: Summary of process elements

	Case 1	Case 2	Case 3
Knowledge generation and sharing			
general knowledge generation and sharing	✖	p	✔
in relation to specific projects	✔	✔	✔
Analysis			
project or issue focused analysis	✔	✔	✔
analysis based on economic drivers, including competition	✖	✖	p
Options evaluated in relation to strategic plan	✖	✖	✖
Emergent strategy			
emergent approach	✔	✔	✔
recongition of emergent projects in strategic plan	✖	✖	✖
Monitoring of progress			
project specific monitoring of progress	✔	✔	✔
monitoring of progress in relation to strategic plan	✖	✖	p
Review of strategic plan/direction	✖	✖	p
Constant reference to strategy	p	✖	p

Knowledge generation and sharing

During the interviews it appeared that knowledge generation and sharing differed with respect to whether the knowledge was related to an individual project or issue or the overall organisation or economy. This distinction was addressed by creating two sub-elements: general knowledge generation and sharing; and knowledge generation and sharing in relation to specific projects. General knowledge generation and sharing was present in Case 3, partially present in Case 2 and absent from Case 1. Case 3 was the only organisation that appeared to consider the region in its broader context, as operating in a competitive economic environment. In this case, the organisation commissioned quarterly reports on the region's economy for distribution to the membership base. A research project was also undertaken to understand the economy in comparison to other regions. An interviewee talked about the desire to understand the industries in the region so as to be better able to assist them.

Case 2 was concluded as having a partial presence due to the use of some regional statistics, although one interviewee suggested there was an absence of general research behind decisions:

> This skills attraction and retention project, the reason that's on there is because I argued it should be there. Not because of any research.

The interviews in Case 1 did not identify any formal or informal mechanisms for gathering information on the overall economy of the region or potential competition to the region.

All cases demonstrated a presence of knowledge generation in relation to specific projects or issues. In Case 2, an interviewee did not approve of perceived methods of knowledge generation:

> They come back, never with anything written or formal or otherwise, and never with any research based around that activity. Apart from anecdotal research.

Another interviewee in this case felt the consultative method of research on specific issues was appropriate, explaining that it helped to understand actual needs and impacts of initiatives. Another concern was raised in Case 3, where an external interviewee felt that the Board had previously not been provided with much information, and that led to rubber-stamping of decisions. This perception was challenged by Board members in Cases 3 and 1. The potential for decisions to be based on less than rigorous research arose in all cases, and to some extent, interviewees acknowledged that Board members did rely on their own opinions and experience to make decisions: 'There's a reasonable percentage that's in their heads'. This interviewee was supportive of the role of Board members, suggesting that they often undertook research on an issue of concern and brought it to the Board.

Knowledge sharing was also considered. This was generally consistent and felt to be positive, although in two cases there were comments about information being withheld from organisation staff to either protect them or because they did not need to know: 'There's a lot of hidden agendas… just as a natural thing'. Not all interviewees were negative. There was a sense that attending meetings enabled participants to learn about what was happening across the region.

An interviewee in Case 2 talked about openness between the regional organisation and others in the region, suggesting that members were often aware of things that were happening before the general community. Another interviewee in Case 2 explained that sharing information was important to the successful implementation of an initiative because: 'Part of the process of seeing a lot of these projects to fruition means engagement of the community'.

Analysis

As discussed in relation to the element of knowledge sharing, knowledge is often generated in relation to specific projects or issues. The process of applying this knowledge to consider the issue is analysis. This element was split into two sub-elements: project or issue focused analysis; and analysis based on economic drivers, including competition. In terms of individual projects, issues or opportunities, all cases demonstrated a presence of the element. While not specifically identified as analysis, the element was described by interviewees when identifying responses to issues. For example:

> What we're going to be doing now is a survey of business and conduct a forum to
> get a scope of how big the problem is.

Analysis in relation to specific projects was present particularly through the preparation of reports, email messages, business cases and discussions at meetings: 'It just becomes apparent that… we need to take this to the next level'. Analysis was not just present in relation to problem identification. It was also recognised in the development of strategies, as highlighted in Case 2:

> Are we prepared to sacrifice some good agricultural land for the development of a facility that will be value-adding to rural industry?

While interviewees were able to identify analytical approaches, there was limited awareness of the element of analysis and the different options available for use in decision making. Just as there appeared to be no deliberate attempt to use specific analytical tools, there did not seem to be a conscious application to decisions of knowledge on economic drivers and competitive forces. This element – of analysis based on economic drivers including competition – was generally thought to be absent. Case 3 demonstrated a partial presence because of a large project that included research and analysis on drivers and competitors as a key step.

Cases 1 and 2 did not appear to consider economic drivers or competition in relation to the organisation or region. As one interviewee stated:

> You've got people who are leading these organisations in most senses, don't know or understand the key drivers for development in any sense at all.

Rather, as discussed earlier in this item, the focus is on a specific project and its direct impact. A number of interviewees across cases talked about assessing opportunities or threats in terms of how they impact on the regional community.

Options evaluation

Options evaluation considers how different options are assessed to arrive at a decision, particularly whether this evaluation takes account of the organisation's strategic plan. The interviews revealed that this element was absent in all cases. Interviewees in Cases 1 and 3 directly identified the absence: 'Nobody has ever said, "How does that relate back to our strategic plan?"'. An interviewee in Case 2 talked about a process that clearly did not involve consultation with a plan:

> I'd nearly sort of call it an ad hoc approach but it's still based on that gut instinct that is still seeking to sort of achieve the overall direction of the organisation, which is economic development.

Rather than the strategic plan, options evaluation seemed to be based on a range of factors, such as impact on the region, community attitudes, and impact on the organisations of the members making the decision. One interviewee stated:

> But obviously the sheer size of the project's important, how much money we've got available's important, the possible outcomes of the implementation of the project, other qualitative factors are involved.

Emergent strategy

The element of emergent strategy was divided into two sub-elements: an emergent approach; and recognition of emergent projects in the strategic plan. Interviewees were asked what proportion of their activities came from planned strategy and what proportion were emergent. In each case, interviewees differed as to whether they thought the organisation followed a planned or emergent approach. Given this mix, interviewee comments on where projects often came from were used to ascertain the

presence of an emergent approach. The following interviewee comment on an opportunistic approach is an example of this:

> If the government announces there's funding available for certain projects well then we'll typically talk about whether we've got any project needs as councils and then as an individual council we'll then decide ok, do we want to develop an application ourselves, or is this one we see more as a [*regional organisation*] type focus?

In order to ascertain whether an emergent approach is present, a list of projects was compiled for each case. A comparison of these projects led to the conclusion that an emergent approach is generally present, but the broad range of projects means that it is difficult to link projects to specific goals. This suggests the lack of a strategic approach and while an emergent approach is present, emergent strategy itself may be limited. Therefore, Cases 1 and 2 appear to have some elements of emergent strategy, with Case 3 displaying a partial presence. The difference is due to a greater proportion of projects in Case 3 that can be linked to plans. In one case an interviewee talked about a deliberate practice of earmarking funds in the organisation's annual budgeting process that could be used to support emergent projects during the year:

> But we always like to have something up our sleeve if something good crops up. And that does. Now someone might drive into town and say "I want to do such and such". And we like to support that. So you've got to take both approaches.

The interviews also sought to determine whether strategic plans were updated to incorporate emergent projects as they were agreed. No interviewees in any of the cases identified instances where strategic plans were updated, so an absence of the second sub-element was indicated.

Monitoring of progress

All cases appeared to monitor progress in relation to specific projects that were underway. This was described by interviewees in Case 3: 'At each Board meeting we get a report and they provide an annual report to all their members'. However, limited progress reporting was undertaken in relation to achievement of the strategic plan. The element was absent in Cases 1 and 2 and only partially present in Case 3. In Case 1, an interviewee stated:

> Most of it... doesn't seem to be drawn back to "This is what we said we'd achieve this year or over this three year period... are we ticking off some milestones to achieve that?"

Case 3 demonstrated a partial presence of the element of progress monitoring in relation to the strategic plan, due to the application and use of Key Performance Indicators (KPIs). An interviewee suggested the presence of a review against KPIs:

> We have to meet those guidelines every six months to have our funding continued and we've managed to do that so far. We're obviously hitting the goals that we agreed to meet with the [*State Government Department*].

An interviewee in Case 2 displayed some consciousness of overall progress by suggesting that there were a lot of unfinished projects, but that this was to be expected.

Review of strategic plan

Generally, interviewees were not involved in a review of the relevant organisation's strategic plan. In Case 1, an interviewee stated that the plan had been in place for about a year and was probably due for a review (although none was scheduled at that time). In this case, the element is noted as not being present, however, the intention to review the document is recognised. Case 2 also displays an absence of the element. An

interviewee stated that an evaluation of the organisation and its strategies is not done often enough.

The current strategic plan in Case 3 was thought to be a review and update of the previous plan, however, an interviewee suggested that the current plan was completely different to the previous one. This element is concluded as being partially present. Board members interviewed were not sure what the current version was, and no review of that plan was identified. Another interviewee in this case referred to a change of General Manager/Executive Officer as a missed opportunity for review:

> They've said "We'll continue with this". I think they need to take the strategic
> realignment and say "Hang on a tick, this is where we should be going and these
> are the things that we are capable of achieving".

Constant reference to strategy

Generally, interviewees did not consult the strategic plan on a regular basis. An interviewee in Case 1 claimed they opened the plan the morning of the interview for the first time since they had received it a year ago. One interviewee in Case 2 suggested that they were too busy to consult the plan regularly:

> Not often, because you know, we're all running our own businesses or involved at
> a senior level of our organisation so I've got heaps of things I should be reading
> but I don't.

Besides being too busy, another reason for not consulting the plan was that it was not necessary – Board members knew what was going on because they attended meetings. Only two interviewees stated that they consulted the plan regularly. A General Manager/Executive Officer reported that they open the plan on a weekly basis and a Board member in a different case stated that they look at the plan when Board papers

are received and a couple of times in between each Board meeting. Due to these interviewees, Cases 1 and 3 are identified as having a partial presence of the element. Case 2 did not identify any interviewee that constantly referred to the strategy, so the element is absent in this case.

4.2.3 Output elements

As presented in table 7, all cases displayed the same results for four process elements. With respect to the other elements, the cases were quite different in their results. Only one process element was established as being fully present, with a number of elements concluded as absent.

Table 7: Summary of output elements

	Case 1	Case 2	Case 3
Regional vision	✘	✘	✘
Long term plan or goals	✘	✘	p
Formal document	✔	✔	✔
Ordered priorities	✘	✘	✘
Performance measurement			
project specific performance measures	p	p	✘
overall performance measurement framework	✘	p	p
Implementation plan	✘	p	✘
Communication of strategy	p	p	✘

Regional vision

None of the cases were found to be working towards a single, agreed regional vision. Interviewees either thought there were too many visions, due to each Shire having a number of different ones, or that the vision was not well understood. The lack of a regional vision was also apparent through other interviewee comments, such as a suggestion that members of the community do not see the big picture. When describing what they thought the regional vision was, interviewees often referred to growth: 'One

focus is keeping people in the area and the other is attracting more people to the area'. Cases 1 and 3 had published an organisational vision and some interviewees shared an understanding of this vision. There was also a similarity between these visions, with Case 1's vision being 'Taking the lead' and Case 3's being 'Leading economic development in the region'. While many individual organisational visions were present, the regional organisations were not focused on achieving a single regional vision and this element is concluded as absent.

Long term plan

In Case 1 an interviewee presented his perception of long term planning: 'What is it that will make this area survive the next fifty years?' and:

> Have they really set their sights on you know, the ten year goal and are making
>
> all their decisions around that which might be passing up some opportunities on
>
> the way, because they are actually focused on where they really want to get to?.

This interviewee thought that long term planning as described was absent from Case 1, and other interviews generally supported this view. A long term plan is also absent in Case 2 and only partially present in Case 3. While interviewees in Cases 1 and 3 identified five year strategic plans developed by their respective organisation, none of the three cases appeared to have developed plans with longer timeframes. The partial presence of a long term plan in Case 3 is due to the recognition of a link with a fifteen year plan driven by a State Government department. One interviewee thought that the organisation was involved mostly in long term projects and another agreed but suggested that the goals were not clearly articulated:

> Because if it's a long term twenty year growth pattern, then it needs to be
>
> recorded as part of their twenty year strategic plan.

Most interviewees commented about the short term nature of activities. In Case 1, an interviewee thought the Board only considered the future twelve months. In Case 2, an interviewee provided a bit more detail on the short term aspect:

> Unfortunately the organisation is short-term funded. So very much like a political process, everything to do with the [*regional organisation*] has a short term timeframe. It's to satisfy the squeakiest wheels at that particular time, which is quite frustrating from my perspective.

However, in this case an interviewee questioned 'The assumption that the short term goal is of a lower priority than the big term goal'. Yet another interviewee in the case thought that being strategic meant greater control and a more direct route to achieving desired outcomes. This was supported by an interviewee in Case 1 who suggested that having a strategic focus helps the organisation to focus in the long term and not be distracted by internal and external influences.

Interviewees also shared thoughts on why they believed the short term focus dominated. One interviewee talked about the need to demonstrate outcomes:

> Because you can't get runs on the board and it virtually forces you to some of the quick fixes instead of looking at the long term, strategic, valuable outcomes.

Another linked strategic planning with funding timeframes, stating that even a five year timeframe was unrealistic when funding followed a three year cycle. These two elements were combined by one interviewee who suggested pressure came from members for short term outcomes:

> You pay a twelve month membership and you gauge the performance on that person and if they haven't come up with the ticks on the board in that twelve months that you think they should have, then you go "Oh well I'm not going to be a member of that organisation".

An interviewee in another case also acknowledged the influence of particular groups, and showed an understanding of the impact of a short term focus:

> They're the type of things that we've gone down a line to essentially meet a demand by a sectoral interest. Now, I suppose in using the devil's advocate hat, you can argue that the time that has taken us away, has essentially taken away time to work on maybe an initiative that could fix the problem.

One interviewee also suggested that the external environment impacted on the relevance of long term planning in that development had happened much faster than anticipated.

Formal document

All organisations presented their plans in a formal document so this element is present. A few interviewees mentioned taking the document to meetings or keeping it on their desk, and others thought it was useful for new members. One interviewee stated that the strategic plan was one of the first things they asked for when being appointed to the Board of the regional organisation. Another interviewee also thought the document was relevant for new members, but that this relevance was limited:

> When you've actually gone along to the first, second third meetings, whether it actually bore any relationship to that document or not isn't going to matter.

Another reason to have the document was awareness of the original focus, as one interviewee suggested that without it, someone could change the rules or direction and no-one would really know.

Ordered priorities

The interviews identified that, while there is a sense of priorities in all cases, none of the organisations ordered their priorities with a view to achieving the strategic plan. There is an absence of ordered priorities across all cases. In Case 1, an interviewee talked

about the presence of a sense of priorities, and that the General Manager/Executive Officer drove this by bringing matters to the attention of the Board. However, this interviewee also suggested that priorities were not ordered in terms of considering alternative activities: 'I don't think I've seen the three or four quite big issues and which one do we really take forward.' In Case 2, an interviewee argued against deliberately ordering priorities, suggesting that to commit to ordered priorities removed the ability to adapt to more pressing issues. This was supported by an interviewee in Case 1 who stated:

> The real world is that… an urgent issue can take over everything else, and be dominant for a week or two or a month or two and then bedded down to a certain degree. Either there's no progress or you've got a solution and you move forward.

An interviewee in Case 3 interpreted this perspective as a lack of planning and suggested that it was pretty chaotic most of the time. In all cases priorities seemed to be set by the Board, and 'Vary to suit the needs of the time'. They are seen to be influenced by a number of sources and require juggling. Community attitudes were identified as contributing to priorities in Cases 1 and 2. Funding was identified as a particular influence across all cases, with one interviewee stating: 'Some projects get prioritised over others because of … an ability… of getting funding easily for them'.

As were deadlines imposed by funding. An interviewee stated that the main priorities were projects that needed to be finished by the end of the financial year to fit with funding timeframes. Another interviewee expressed concern that the influence of funding sources (including membership) led to the organisation taking on too many projects, and rather than prioritising them, tried to deliver all of them at once:

Most of those projects, on their own, aren't particularly onerous or big or difficult but there's just so many of them that in my view you can never really deliver anything to any depth. So what you tend to do is the people that are supposed to be implementing and delivering things for outcomes end up facilitating and they end up playing this game of words which never actually delivers. And that's what strategy's about in my view. Why would you have a strategy if you weren't going to – at the end of the day – try to change something? And if you're constantly just frittering around the edges, you never actually change anything.

Interviewees in one case also talked about a staff member who had suffered stress due to feeling responsible for a large number of projects. Recognition of the situation led to the organisation allocating three areas of focus, although these foci did not appear to have reduced the number of options because they were still very broad. The General Manager/Executive Officer stated that there were still an enormous number of options and that the organisation just took on what it could.

Performance measurement

During the interviews, it became apparent that performance measurement needed to be split into two sub-elements: project specific performance measures; and an overall performance measurement framework. Project specific performance measures were discussed in terms of how the success of particular initiatives was measured and whether these measures were determined in advance. Cases 1 and 2 displayed a partial presence of such measures, however, interviews in Case 3 did not identify clear evidence of a presence and it was determined that this element was absent.

The partial presence is related to funded projects, where funding applications are required to spell out what the project aims to achieve. One interviewee stated that the funding outline flowed through to criteria set for consultant outcomes. When a funding

application was not involved, measures were generally not agreed. Rather, those involved would be able to tell if something was successful, according to one interviewee: 'Those Mayors and that that are going, they will get a feel straight away as to whether or not it's successful'.

The idea of community feedback was also identified as a measure of success in Cases 1 and 2:

> How do we know if we've succeeded, but I suppose I would counter that by saying is the big measurement… is the community still saying it's an issue?

The overall performance measurement framework for the organisation was discussed in terms of how the organisation could tell if it was performing successfully, how others perceived the success of the organisation and whether a framework of measures tied to the purpose and goals of the organisation was in place. As with project specific performance measures, funding requirements were responsible for any measures put in place in advance. Cases 2 and 3 both demonstrated a partial presence of an overall performance measurement framework, due to funding provided by a State Government Department and tied to a set of Key Performance Indicators (KPIs). An interviewee in Case 2 expressed a concern with these measures, stating that they were not relevant to the organisation. An interviewee in Case 3 agreed that they could be more specific, but thought there was an opportunity to resolve this as the measures were developed through negotiation with the regional organisation.

A measure that was perceived as having meaning to all three cases was member satisfaction. In one case it was suggested that the organisation was evaluated by members every week and on every initiative, but that it was not a structured process. This was supported by another interviewee who focused on individuals' satisfaction with specific contributions. He suggested that participants needed to see a return on

their investment of time or capital. Expectations of members and others in the community were thought to be central to the evaluation of success. The absence of measures was highlighted by one interviewee, who stated that Councils handed over money based on a general expectation of benefit.

Another interviewee came to the realisation that expectations not converted into measures may not be the optimal approach:

> There is the possibility that without set measures an agreed performance… if that trust starts to wane where they're saying "Geez what's the [*regional organisation*] really doing?" Maybe that informal approach that we have at present needs more thought.

Interviewees in Case 2 talked about future plans to develop and implement Service Level Agreements (SLAs) between local government member organisations and the regional organisation. This was also being considered in Case 1, although no definite plans had been made. An interviewee in Case 2 warned that it was important to set a realistic expectation.

Interviewees generally agreed that there was a basic expectation common to members – for tangible outcomes:

> To convince people that an organisation is doing its job, people physically want to see something. They want to be able to touch it.… Although from where I sit… I know that not everything will be tangible outcomes. It takes a lot of work to attract a power station here.

This was supported by another interviewee who suggested dissatisfaction came from one simple element: 'The amount of money that goes in and the amount of things that don't come out'. Another interviewee suggested that the danger with expectations was that there was a lack of understanding of the difficulty of the task, and this led to

pretence of delivery. To overcome this pretence, one interviewee suggested: 'Measurement of are we doing those things that we say we should be doing?' Some interviewees provided an indication of what this evaluation might include. In Case 2, an interviewee referred to areas not measured, such as the encouragement of jobs and overcoming the skills shortage, as well as areas measured, such as how many businesses the organisation has worked with. An interviewee in Case 3, stated that things like how many extra organisations were brought into town and how well the organisation value-adds to others were difficult to measure. The idea that some outcomes were difficult to measure was supported by many interviewees. In Case 1, an interviewee contrasted a perception of immediate effectiveness versus long term outcomes: 'You think that you may not be successful but yet the long term result could be there'.

Implementation plan

As the link between a strategic plan and the day to day activities of the organisation, the implementation plan was sought as a key element in the research. However, only Case 2 displayed a presence of an implementation plan and this was a partial presence, due to the development and use of an annual operational plan that was perceived by one interviewee to be out of date. An interviewee in Case 3 admitted to the presence of a business plan but claimed an absence of the element:

> Putting them into an operational plan perspective. I don't think we're doing that.
> You would have absolutely no doubt on what you should be doing pretty much on
> a day to day basis to achieve this sub-strategy.

A key element of implementation plans is the allocation of implementation responsibility. The absence of this was illustrated by one interviewee who talked about the tendency to suggest someone should do something but not to be specific about who.

Interviewees in all cases tended to agree that implementation responsibility sat with the staff of the regional organisation. However, one interviewee thought that there was a missed opportunity to involve others in implementation because there was 'no deliberate attempt to influence the agenda of other groups to assist.'

Another aspect of implementation plans is allocation of timelines for project completion. One interviewee suggested:

> Sixty to seventy percent of your outcomes have got to be around the twelve months and the rest of it is around the three to five years.

This suggestion was echoed by another interviewee who thought implementation planning was essential, and that it could be done through a step out process:

> A step out in year one, this will be the project and this will be the outcome. If it's not achieved at the end of year one, this is what it will look like at the end of year two. And these are the projects that are three to five, five to ten.

No case displayed this level of detail in implementation planning. One interviewee claimed to have previously used this approach and moved back to less systematic reporting.

Communication of strategy

The organisations used a few methods of communicating their overall approach and current activities. The General Manager/Executive Officer of each organisation made presentations to member Councils (and sometimes other Councils), the regional organisation in Case 2 published a summary brochure of its goals, and in Cases 1 and 3, information was provided on the website of the regional organisations. Generally the annual reports of the regional organisations did not set out their strategies as part of the reports. The presence of this element is concluded as only being partial in all cases as

no clear link could be traced between what was communicated and the organisation's strategic plan. For example, in Case 3 an interviewee thought there was a nice glossy brochure and interesting email messages, but that they were not specifically targeted and lost effectiveness as a result. In Cases 1 and 2, interviewees provided a similar impression that the general community was not aware of the regional organisation or its activities.

4.2.4 Characteristics of outputs

The majority of elements termed characteristics of outputs were identified as partially present in most cases. This is displayed in table 8, which also shows an absence of clarity across all cases.

Table 8: Summary of characteristics of outputs

	Case 1	Case 2	Case 3
Realism	p	p	p
Relevance	p	✘	p
Creativity	p	p	✘
Clarity	✘	✘	✘
Consistency	✔	p	p
Complementarity	p	p	p

Realism

A sense of realism was partially present in all cases. Realism relates to whether processes recognise the nature of the operating environment. For example, one interviewee talks about how the original approach to development was found to be unrealistic due to an eventual awareness of interrelationships between economic development initiatives:

There were four working groups that came out of the mining forums, one was business development, which was the sort of initial focus - housing, skills shortage and promote and develop the region. Well we're doing the promote and develop stuff, we're doing the skills stuff, we're doing the housing, business development's fallen off the list...Well the others are impediments to business development.

This process of reality not matching initial expectations was recognised by another interviewee who stated that unanticipated changes in the external environment rendered the plan irrelevant. This occurrence was attributed to a lack of understanding of economic drivers (discussed in elements such as knowledge generation and sharing, analysis and options evaluation). Another area where realism was thought to be important was recognition of the organisation's own limitations. Some interviewees were quick to point them out: 'I'm not convinced that the capability is in their organisation to deliver'. Another interviewee stated that the regional organisation was trying to cover too large an area with the resources it had access to.

Interviewees in all cases talked about the need to recognise and take advantage of the skills and experience of Board members and staff. One interviewee suggested that an awareness of the personality styles, skills and expertise of staff provided the basis for innovative initiatives in engaging the community. Another perspective on realism was a perceived lack of recognition of the impact of multiple stakeholders, particularly in Cases 2 and 3. An interviewee claimed: They're trying to keep too many people happy'.

Relevance

Relevance relates primarily to whether the strategic plan appears to be relevant to stakeholders. However, comments also arose in interviews relating to whether the organisation itself was perceived to be relevant. An interviewee in Case 3 thought the regional organisation was too heavily focused on government and did not engage effectively with the business community. This was thought to result in a lack of effectiveness, possibly due to what one interviewee labelled as What's In It For Me (WIIFM). This interviewee also suggested that expectations differ between members due to varying fee structures and the requirement for different outcomes. This suggests that activities may be relevant for particular members. An interviewee in Case 3 stated:

> You will not get your smaller businesses if you can't convince them that they're
> going to be benefited directly. Because small business – that's their mentality,
> that's the way they think. So I treat them a little differently to how I treat my
> other members.

Interviewees also commented on the limited relevance of the current plan. One stated that the plan lost relevance as soon as members attended Board meetings. Another identified a strategy in the plan that was clearly out of date. An interviewee in one case felt that the geographical area of the region was not relevant because it was not structured around economic commonalities. In another case an interviewee thought the organisation name was not relevant to the geographic area covered by the region. Other aspects of relevance that arose during the interviews include a perception in one case that the funding Key Performance Indicators imposed by the State Government were not relevant to the staff of the organisation, that some activities were not relevant to economic development and that planning processes were not relevant due to the presence of mature relationships between organisations within the region.

An interviewee summed up this latter point and provided his view on the matter:

> Sometimes some people, don't believe that strategic planning is important. They
> tend to believe that it's purely knee jerk stuff – economic development is reactive
> stuff. When you hear about, or if you haven't heard about it, go out and hear
> about it, or go out and make it happen. And I work on that philosophy if it's not
> happening, then let's go and make it happen. But you need to have a plan.

Another interviewee stated that the strategic plan was too large. The relevance of the
strategic plan as an element was concluded to be partially present in Cases 1 and 3 and
absent from Case 2. This is based on the presence of a current plan for Cases 1 and 3,
and while some interviewees were not aware of it or did not support it, other
interviewees thought the plan was relevant. This did not appear to be the same in Case
2, where no interviewees even referred to a strategic plan.

Creativity

Creativity, as a general element, relates to whether different processes are applied to
generate different results, whether the status quo is questioned and also whether
interviewees felt creativity was present. The conclusion is that it is partially present in
Cases 1 and 2 and absent from Case 3. In Case 1, Board members were thought to have
'Really explored what would be the best options and where should they go'. The
creative process was also likened to flexibility in opinion, as an interviewee described:

> I think you sit down and listen to everyone else's opinions and you may even
> have an opinion, someone says something, no, let's try it this way and so you
> change. So I think you've got to have flexibility.

An interviewee in Case 2 thought creative solutions were developed, but were then
watered down as a result of resourcing and other implications. When challenged with

limited resources, this interviewee thought the organisation reverted back to standard (and ineffective) approaches. In Case 3 an interviewee challenged whether there is time for creativity, due to the number of activities being undertaken by the regional organisation. Another interviewee suggested that creativity occurs most in terms of how initiatives are described as relating to the corporate plan.

Clarity

The interviews and document analysis found there was a lack of clarity across all cases. Discussions on the elements of shared understanding of specific purpose and goals of the organisation and clarity of roles and responsibilities highlighted the absence of clarity. In some cases a lack of clarity was thought to be desirable because it gave the organisation greater flexibility. The result of this flexibility seems to be confusion, as identified in Case 3:

> We take on regional significant projects, pretty much. That's what we do. Well, we take on others but pretty much that's our predominant role.

Another interviewee in Case 3 thought aims and objectives were not clearly defined and that part of the problem was due to Board members being appointed for the wrong reasons. Within the Boards, there was a high level of confidence in competence, but this was at odds with the lack of clarity. One interviewee stated that when they commenced with the organisation, they could not tell what needed to be done and the Board did not know what the current status was either. Another interviewee suggested that the Board's understanding of base economic growth and individual strategies was quite shallow, yet there was a commitment to the general idea of economic growth.

Consistency

Consistency is concluded as being partially present in all cases. While some cases displayed consistency in different ways, none of the regional organisations' activities were clearly consistent with each other and the direction set in the strategic plan. In Cases 1 and 2, interviewees felt that processes of investigating, discussing and progressing initiatives were fairly consistently applied. Over all the cases interviewees talked about the need to consistently consider the expected regional benefit. However, this did not always occur:

> I think it's very easy to be dragged off on a tangent because somebody is dragging you that way. So we always need to be conscious of that and I guess that's a challenge in itself. Remain focused on what you're really there for.

This interviewee also talked about the need for the organisation's goals to be flexible, which can detract from its focus. This may be due to stakeholder influence, as suggested above, or a distraction caused by concentrating on a particular project. This was reported by one interviewee who referred to a project that sidetracked a group within the regional organisation to the extent that they forgot what their original purpose was.

Another interviewee suggests that consistency may lead to missed opportunities and the belief that it is undesirable to turn away anyone that approaches the organisation with a proposition. However, an interviewee in another case thought this attitude led to confusion:

> That's not a development project, see. Why are we doing it? Why are we involved in it?

An interviewee suggested that the consistency provided by a strategic plan helps prevent time from being wasted by ensuring that everything done is progressing a strategy. Interviewees in Case 1 thought there was some consistency. One interviewee implied an almost unconsciously consistent approach:

> It varies between two major focuses – one focus is keeping people in the area and
> the other is attracting more people to the area'

Another discussed a conscious decision in relation to the role of the organisation and not taking on projects that were detrimental to its interests.

In Case 3, an interviewee reflected on the membership base leading to decisions that were not consistent with the overall direction of the organisation, as set by Key Performance Indicators:

> We took them on board for our members. We didn't have members, probably
> wouldn't do it. So, we'd just concentrate on our large projects, and to meet our
> KPIs.

An interviewee in Case 1 suggested that while there was not a deliberate attempt to be consistent with the strategic plan, the organisation probably was still part way to achieving that outcome. The document analysis found that annual reports and other publications were not consistent with the strategic plan in that they did not recognise a prior intention to achieve certain outcomes, rather they reported on what had been done. This reporting was project-focused rather than outcome-focused.

Complementarity

A few interviewees displayed an understanding of the importance of member organisations and others undertaking complementary activities. One interviewee stated:

> The Federal Government… like to see projects developed on a regional basis and if you go in by yourself you get a much less chance of being successful.

Another thought complementarity was missing, suggesting that the organisation would be more successful if it was more coherent as a group. Examples were provided in interviews of instances where actions of an organisation or individual were not complementary to the regional organisation or its strategy. An interviewee in Case 3 referred to an example of progress being hindered unintentionally:

> I've got to wait for this economic development vision to be completed before I can really move on with the economic development strategy. Which I believe will put it back another twelve months. And this vision just came out of nowhere.

In this case, a number of interviewees referred to the same problem, where an individual in an influential position in the region obstructed progress. The deliberate hindering of progress was not perceived to be an issue in Cases 1 and 2. In Case 1 an interviewee talked about occasions where parochialism detracts from a complementary approach:

> So while we've got a [*regional organisation*] to do the overall "Yep we support it" but individual councils might be putting in their own submissions to say "We've got an ideal site for that".

In Case 2, an interviewee suggested an opportunity to increase complementarity was absent because the organisation was not deliberately encouraging it. Other interviewees thought it was present. One stated that he expected the regional organisation to consider his own organisation's corporate plan when developing their

strategies and vice versa and suggested that a benefit of this was a reduction in duplication.

An interviewee in Case 2 also talked about complementarity in terms of individual relationships:

> Part of that is more about secondary credibility than first. You build a relationship yourself, sometimes it's just as important to get your view across for you to have somebody else who agrees with you who's respected by the other person to back it up at a totally separate event and date and so on.

The range of responses on complementarity has led to a conclusion that all cases display a partial presence. However, it should be noted that this presence was stronger in Cases 1 and 2 than Case 3. In Case 1, an interviewee stated that it was assumed by all, that the Councils and the regional organisation had the same objectives with respect to economic development. This confidence contrasted strongly with Case 3, where a member of the regional organisation stated: 'We have duplication, we have people running around doing their own thing'.

4.2.5 Summary of elements

The methodology involved comparing different cases and predicting similar results for each. These similar results were found for twelve elements, where each displayed a consistent presence or absence across the three cases. These elements are identified in table 9.

Table 9: Elements displaying a consistent presence or absence across cases

Present	Absent
knowledge generation and sharing in relation to specific projects	leadership on strategic planning

project or issues focused analysis	shared understanding of specific goals of organisation
emergent approach	options evaluated in relation to strategic plan
project specific monitoring of progress	recognition of emergent projects in relation to strategic plan
formal document	regional vision
	ordered priorities
	Clarity

Not all elements displayed a consistent presence as predicted. Three elements were inconsistent across the cases, and were present in at least one case, but absent in at least one case. These were: regional leadership on economic development; good member to member relationships; and general knowledge generation and sharing. As suggested in section 3.3.1, this inconsistency may offer additional insights and will be considered in the discussion of results in chapter 5.

The remaining seventeen elements were not as clear in their presence or absence. Further research is required in order to confirm a consistency or lack of it across the cases. However, an initial conclusion about presence or absence has been drawn and is shown in table 10. Elements classified as present displayed either a presence or partial presence across all three cases. Elements classified as absent were either absent or only partially present across all three cases. Partially present elements are those that were present in part across all of the cases.

Table 10: Elements displaying an ambiguous presence or absence across cases

Present	Partially present	Absent
shared understanding of general purpose of organisation	communication of strategy	clarity of roles and responsibilities
consistency	Realism	involvement of implementers in strategy formulation
	Complementarity	analysis based on economic drivers, including competition
		monitoring of progress in relation to strategic plan
		review of strategic plan/direction
		constant reference to strategy
		long term plan or goals
		project specific performance measures
		overall performance measurement framework
		implementation plan
		relevance
		creativity

4.3 Summary of cases

4.3.1 Case 1

Case 1 displayed excellent member to member relationships, with a small membership base of organisations that were similar in nature and motives. The membership base included key regional players from government with no significant omission. The organisation did not undertake regional planning, rather developed a five year organisational strategic plan and its activities followed a responsive rather than planned focus. Performance measurement appeared to be related to grants attained and whether key issues were effectively responded to. Members were very pleased with the organisation and a growth in membership was forecast to occur in the short term, bringing a growth in funding (this was realised following the data collection).

4.3.2 Case 2

Case 2 displayed positive working relationships across a membership base that was large and complex. Members appeared to have different motives. Most key regional players seemed to be involved with the organisation in some way. Of those involved with the operation of the organisation, there appeared to be unnoticed but significantly different philosophical views on economic development. The organisation developed a regional plan many years ago and it is not considered to be relevant anymore. Its activities are mostly responsive and performance is measured on community feedback and member perceptions regarding whether tangible outcomes had been delivered to them. The membership base appears to be generally satisfied with the organisation and its membership and funding is expected to continue.

4.3.3 Case 3

Case 3 displayed some good and some very poor relationships. It has a large membership base with a range of motives for being involved. Some key regional players are not involved and do not appear to be supportive of the organisation. The organisation appears to be developing a link to an externally prepared regional plan and has an organisational strategic plan with a five year timeframe. Activities are a mix of planned projects and responses to opportunities. The performance of the organisation is measured on tangible deliverables provided to members and outcomes perceived as a result of significant government funding. Not all members or regional players are satisfied with the organisation and there are threats to the continued funding and operation of the organisation.

4.4 Challenges identified

Interviewees were also asked to identify challenges for strategic planning in a regional context. Responses across cases were consistent and related to the external environment, membership base, and activities of the organisation. Interviewees felt that the dynamic nature of the external environment made it difficult to operate and to forecast future scenarios and plan for them. There was also a perception that community expectations added a challenge because the community wanted more of a say in the direction of the region and were becoming more demanding as a result.

The membership base presented a number of challenges. First of all, the personalities of some individuals could occasionally be difficult to work with. Secondly, some members were thought to have unrealistic expectations in terms of the organisations' outcomes:

They are not long-term focused people, and they can ruin these organisations, wanting quick fixes. They're in a business, they know how long it took them to get where they've got and as big as they've got… Now why are they thinking that these organisations are any different?

Also related to membership was a concern that members would not recognise the benefits. An interviewee in Case 3 stated that it was difficult to show different parts of the regional community how an initiative might benefit them, especially because they had their own agendas and expectations. An interviewee in Case 2 thought there was a possibility that members would not fully appreciate the scope of the region and thought a shared awareness of what was within the region was important at Board level. Another interviewee was concerned about the difficulty associated with the voluntary nature of involvement on the Board, suggesting a challenge was maintaining the interest and involvement of Board members. This was related to a concern from another interviewee in the same case, that the time needed for thorough strategic planning was a challenge:

When you start to discuss strategic issues across an area, you really need to put a fairly big chunk out there of time because you need to allow for – if you're going to get anything creative – you need to allow for people to get off the track.

Also related to strategic planning processes within the organisation was a concern about the impact of the organisational culture and the difficulty in changing the culture when required. This interviewee highlighted the importance of commitment and building a plan that did not sit on the shelf but that was workable.

An interviewee in Case 3 voiced a concern that was mentioned by a number of interviewees – the problem of size:

Because we're tiny, and I said to you before that we might have a turnover this

year of $1m dollars, but in reality the majority of that money's project money.

It's not going to affect our viability if we don't get it, it affects the top and bottom

line exactly the same way. We would like to get it and be the facilitator of those

projects because we believe that they're worthwhile. But the sheer… smallness

of our organisation makes it difficult to be very strategic at all.

4.5 Conclusion

The results of the data collection were presented in this chapter, by discussing findings

related to each element across the three cases. Similarities in the presence and absence

of twelve elements or sub-elements were identified. Elements present across all cases

were: knowledge generation and sharing in relation to specific projects; project or issues

focused analysis; an emergent approach; project specific monitoring of progress; and a

formal document. An absence of the following elements across all cases was found:

leadership on strategic planning; shared understanding of the specific goals of the

organisation; options evaluated in relation to the strategic plan; recognition of emergent

projects in relation to the strategic plan; regional vision; ordered priorities; and clarity.

A summary description of the three cases was provided, highlighting excellent

relationships and a positive future outlook for Case 1, good relationships and a positive

future outlook for Case 2, and some poor relationship and an uncertain future outlook

for Case 3. A number of challenges were identified relating to the external

environment, membership and activities of the organisation. The implications of these

results will be discussed in chapter 5.

CHAPTER FIVE

5.0 DISCUSSION AND CONCLUSIONS

5.1 Introduction

The thesis presents a sequential exploration of strategy processes in regional economic development organisations. The significance of this research is identified in chapter 1 as related to the growing interest in regionally driven approaches to economic development (McKenzie 2003) and the current lack of literature on strategy processes applied from this perspective.   The opportunity to confirm variables for the future development of strategy models is identified and the scope of the project is stated as describing strategy processes from a business management theory perspective.   The scope excluded an investigation of potential relationships within strategy processes and evaluation of strategy content in order to focus on the processes themselves.

To explore regional economic development, chapter 2 determined that regions were geographically defined to be smaller than a state and incorporate three or more local government areas (Dore & Woodhill 1999).   The chapter suggested that regional organisations were modular in structure (as depicted in figure 1, p.28) and that this led to opportunities and challenges for the operation of these organisations. The use of a collaborative approach was thought to be relevant to regional organisations and key success factors for collaboration were identified.   The application of strategy by regional organisations was acknowledged and discussion was provided on the perception that strategic plans were not being implemented. This was supported by theory on strategic approaches and the respective advantages of planned and emergent

strategy. A typology of strategy (Mintzberg & Waters 1998) was described to demonstrate different configurations of planned and emergent approaches.

Building on the theory presented in the first half of chapter 2, research questions were constructed to guide exploration of strategy processes and stakeholder involvement in implementation in regional economic development. These were:

- To what extent are stakeholders involved in strategy implementation?

- How do stakeholders perceive strategic planning?

- What elements of strategies relate to implementation?

- Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?

- How are strategies documented?

- Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?

In order to provide the desired description and respond to these questions, a theoretical framework was developed containing twenty seven elements. This framework is presented in figure 5 (p.70). These elements were aspects of collaboration, strategy and implementation thought to relate to successful strategy implementation processes.

An approach to investigate the presence or absence of each of these elements was developed in chapter 3. This involved a case study methodology, selected to meet a need for a description of the elements as they occurred within the regional and organisational context. Three case studies, each involving six interviews with organisational stakeholders and a document analysis, formed part of the deductive methodology. While this approach allowed investigation of a predetermined set of

elements (Ali & Birley 1999; Blaikie 2000; Hyde 2000; Sekaran 2003), the interviews were semi-structured to allow for identification of additional elements and challenges arising from the regional context (Jarratt 1996; Reige 2003).

The qualitative method produced a large amount of data on each regional organisation. This was presented in chapter 4, through a discussion of the findings in relation to individual elements, and a brief summary of each case. As predicted, some similarities in the presence, partial presence, and absence of elements were found across cases. There were also differences between the cases. The implications of these findings will be discussed in this chapter and responses to the research questions will be provided in sections 5.2 to 5.4.

The conclusions reached though this discussion will be applied to policy and practice through a consideration of the managerial implications of the study findings. These will be identified in section 5.5 to contribute to the study's broader aim of enhancing regional economic development practice. The study methodology will be reviewed to understand limitations of the research. Finally, complementary directions for future research will be suggested to guide further investigations into regional economic development practices and outcomes.

5.2 Regional organisations as collaborations

In order to describe the complex context within which strategy was being applied, Chapter 2 concluded that regional organisations were often collaborative in nature. It presented a number of factors essential to an effective collaboration, including leadership, trust, compatible goals, a sense of shared benefit and good accessibility between parties (Faerman, McCaffrey & Slyke 2001; Raco 1999; Salmon 2004; Thompson et al. 2002). The theoretical framework suggested that these factors

combined with elements of strategy to affect stakeholder involvement in implementation.

Analysis of data in chapter 4 supported the suggestions that trust between collaborative partners (Faerman, McCaffrey & Slyke 2001) and a sense that there is a positive link between the fortunes of each other (Thompson et al. 2002) contributed to collaboration effectiveness. The case in which these elements were clearly present was Case 1. The organisation in this case also displayed the most confidence in its ongoing operation and an expected increase in resources. Case 2 displayed some trust and positive relationships and generally expected to continue in the medium term. There was a clear lack of trust and evidence of conflicting goals impacting negatively on the organisation in Case 3. A number of interviewees were concerned that the organisation's future was in doubt, suggesting that the collaborative approach was not working effectively or was not present.

An aspect raised in the literature review as essential to a successful collaboration is effective leadership (Faerman, McCaffrey & Slyke 2001). During the analysis, leadership was considered in more detail by examining regional leadership in economic development and leadership in strategic planning. Leadership in strategic planning was absent from all cases, however, Case 1 displayed a presence of regional leadership and Case 2 a partial presence. There seems to be a parallel between good member to member relationships and a presence of regional leadership, however, further data is needed in order to confirm this parallel.

The theoretical framework presented in chapter 2 suggested that collaborative organisations would benefit from applying a planned approach to strategy. This perception will be reviewed with reference to the data collected for each case study organisation to determine if that benefit is perceived and whether strategic planning is

considered relevant by participants. Section 5.3 discusses how planned strategy is being applied in the regional economic development organisations investigated in this study.

5.3 Planned strategy

5.3.1 The perceived relevance of strategic planning

The data analysed in chapter 4 provides an opportunity to address the research question *"How do stakeholders perceive strategic planning?"* This is discussed in terms of the regional organisations' motives for strategy, their awareness of the benefits of strategic planning and perceptions of its relevance in their organisations.   The expected advantages of strategic planning over emergent strategy identified in section 2.6.3 are examined in the light of study results to see if they applied as anticipated.

Chapter 2 suggested a motive for the use of strategy in regional economic development organisations as to enable collaboration on a long term vision and strategies that achieve this vision (Pammer 1998). Based on the analysis in chapter 4, it may be concluded that the case study organisations do not share this motivation for strategy. Interviewees in all cases were aware of the benefits of a strategic approach, but perhaps because of the effort required to apply one, it seems as though the primary motivation to develop a strategic plan was to meet an expectation from funding bodies, rather than to achieve the aforementioned benefits. In Cases 2 and 3, evidence of planning for the future was a requirement for funding and plans were linked to indicators to enable assessment of organisational performance against funding requirements. In Case 1, the strategic plan was an internal operational document that related to staff activities rather than Board of Directors' decisions.

Interviewee comments about the need for a plan suggested that they understood that strategic frameworks could help the organisation to move in a particular direction and

make decision making easier (Grant 2003), however, the case study organisations seem to have been confounded by the challenges of strategic planning in a regional context and have not been able to fully apply the concept. The changing nature of the external environment over time led to a perception that forecasting and planning was too difficult to be worth the effort. Participants seemed to be concerned that what they perceived as important or achievable now may not be the case in the future, so it was pointless to commit the organisation to it over the long term.

The emphasis on current issues was particularly strong in Case 1, where most of the members were leaders in local government and were constantly under pressure to respond to immediate community demands. Interviewees across all cases talked about community satisfaction as a measure of the organisation's performance, suggesting sensitivity to contemporary issues. Participants understood that strategic planning could provide them with direction, however, when it came to action they were more interested in responding to community demands than following a predetermined direction. This may be related to the political nature of the organisations. Participants were mainly government staff members or politicians, all of whom were used to being diplomatic, consultative and operating in a context where decisions depend on the tide of public opinion, ultimately voiced through election cycles.

In this context, there was a reluctance to plan long term and commit to something specific. In all cases strategic plans were developed and were current and relevant for a particular point in time, and then rather than being owned by successive participants, they were discarded when times changed and new plans were developed to show intended action on more current topics of interest. Instead of an iterative process, planning started from the beginning each time.

Another aspect of the perceived difficulty in planning for the future related to funding. The vulnerability of funding in the changing political environment (Garlick 1999b; Kazi 1997) was identified in all case study organisations. The major source of funds for the regional organisations was state and local government contributions. Yet the history of regional economic development has seen successive governments adopt different approaches to how it should be funded and managed (Collits 2004). The case study organisations had no confidence in the longevity of their funding sources or their ability to replace them if they were withdrawn. Perhaps this led to a reduced level of commitment to regional strategies because if members publicly committed to strategies and then the funding to implement them dried up, they would be faced with either the need to provide the funding to see them through themselves or face public criticism for promising outcomes and then not delivering them. Flexibility, through commitment to broad rather than specific strategies, was preferred. The provision of clarity identified in section 2.6.3 as a benefit of strategic planning (Zagotta & Robinson 2003), was seen as too risky as it made goals explicit and meant that it was easy to evaluate whether they were being achieved. Perhaps an unwillingness to provide this clarity reflected a lack of confidence in the organisation's ability to achieve long term goals.

The other benefit of planned strategy discussed in section 2.6.3 was the provision of a formal strategy development process that decreased the reliance on (and subsequently influence of) any one individual by ensuring consistent and appropriate processes were followed (Mintzberg & Waters 1998). The case study organisations did not acknowledge this benefit in a direct or positive manner. A number of comments were made in relation to relationships that suggested individuals and organisations were able to influence the activities of the regional body to suit their own agendas. This was perceived as a greater issue in Cases 2 and 3 than Case 1. Interviewees stated they

desired flexibility in the direction of the organisation. What they did not state was that this flexibility provided them with a greater opportunity to influence organisational activities.

Flexibility was seen as essential to cope with the uncertainty of the future and strategic planning was perceived as removing this flexibility. This concern matches that found in literature where strategic planning is challenged as not being flexible enough to cope with a dynamic environment (Mintzberg 1994). Emergent strategy was suggested by researchers (Flaherty, Jirovec & Allen 2002; Walsh, Lok & Jones 2006) as a more realistic approach. Of the three advantages of emergent strategy discussed in section 2.6.3, only flexibility was identified by interviewees as essential. Opportunities for learning and creativity, thought to be provided by incorporating an emergent approach (Hamel & Prahalad 1995; Mintzberg 1994), were not recognised by interviewees as necessary.

The absence of long term goals may be a contributing factor. With long term goals, the organisation would be able to influence community expectations by clarifying what it aims to achieve. Without this specificity, expectations could be based on anything vaguely related to the region or the member organisations involved. Perhaps the lack of long term goals is linked to the absence of leadership on strategic planning, as the organisation might just drift along without a leader driving a strategic approach and uniting the group around this focus (Faerman, McCaffrey & Slyke 2001; Thompson et al. 2002). Given that the organisations were not directly following a strategic plan, they may not have been applying a strategic approach at all. Section 5.3.2 will consider whether a strategic approach is present in any of the case study organisations.

5.3.2 The extent of a strategic approach

To consider whether a strategic approach is present in the case study organisations, a definition of strategy must be applied. Strategy is defined in section 2.6.1 as the direction of multiple consistent actions towards the achievement of a specific goal (Hutchinson & Bretherton 2005). The major components of this definition are consistency of actions with each other and consistency of actions with specific goals. Another component of strategy identified in section 2.6.2 is the presence of competition (Aaker 1989; Bhide 1986; Hamel & Prahalad 1994).

Consistency was partially present in all cases. Analysis that considered projects in progress and completed projects found consistency between some of the projects, although the broad scope of activities in each case suggested that the consistency was not as strong as it could have been. Consistency of actions with specific organisational goals was limited. In all cases, organisational goals were vague and interpreted differently by members. Actions were directed towards general goals such as growing the economy or supporting regional business and industry. The absence of options evaluation in relation to the strategic plan suggests those goals were not usually the main factor in decision making. Most actions appeared to have been selected because of the anticipated reaction of the community or the membership base.

As strategy relates to operating in a competitive environment (Aaker 1989; Bhide 1986; Hamel & Prahalad 1994), the limited focus on economic competition was relevant. Case 3 showed some awareness of the need to consider the competitive environment when planning, but not in relation to options evaluation. Interviewees in Cases 1 and 2 did not refer to the external environment as competitive in any way, even though they competed with other regions for funding, employees and investment.

Case 3 can be regarded as more strategic than Cases 1 and 2. Interestingly, it is Case 3 that is the least collaborative and the most in danger of losing significant funding. All three regional organisations, however, do not use a particularly strategic approach, rather they are responsive to external factors. The consistency found to be partially present in the cases is not purposive or strong. When combined with section 5.3.1, the conclusion is that none of the three regional organisations are actively using strategic planning. There may be a small amount of emergent strategy, but given the limited consistency and failure to achieve or recognise the benefits of learning or creativity, it is likely that this presence is accidental or unintentional.

While the organisations maintained that an emergent approach was more relevant to provide flexibility, they suffered from some of the downfalls of a lack of strategic planning discussed in chapter 2. They were missing a clear, formal reference point (Manderscheid & Kusy 2005), so that when times were busy and decisions were confusing, it was difficult to know where to focus. The result was that new projects often took precedence over achieving the strategic plan or progressing towards specific long term goals.

As suggested in section 2.6.3, the application of planned strategy can lead to the development of more explicit goals and objectives (Manderscheid & Kusy 2005). Without planned strategy, the stakeholders were suffering from some confusion and many different interpretations as to what the organisational goals and purpose were. It was also difficult for members, the community, and other stakeholders to appreciate and feel confident about the purpose of the organisation and whether it was progressing towards its goals. This is important, because all cases referred to community satisfaction as a major measure of success. However, interviewees in these cases

suggested most members and communities did not really understand the true purpose of the organisation.

Another negative impact of a lack of strategy is that the organisations were heavily dependent on individuals and a future change in Board membership or a new Executive Officer/General Manager could completely alter the direction or momentum of the organisation. Different participants could bring their own agendas to the organisation as there is no clear strategy against which they could be evaluated for consistency. As discussed in section 5.3.1, individuals were perceived as influencing the activities of the organisation to suit their own purposes, rather than the purpose of the regional organisation. This detracted from the collaborative approach.

Given that the organisations were described as not being strategic, it is important to note that most interviewees (particularly Board members) were confident in the approach taken by their regional organisation. Interviewees in Cases 1 and 2, and some interviewees in Case 3, felt that the Chairs of the Boards of the regional organisations were performing well. This is consistent with other research undertaken in Australia. Beer and Maude (2002) surveyed the General Managers/Chief Executive Officers of regional economic development organisations and concluded that there was a great deal of confidence in the impact these organisations were having on their region or community. Organisations in Queensland were the most confident of all Australian organisations. As this confidence was found in the case study organisations it may be inferred that some results are being achieved for the region. These results may be due to implementation of strategies or other activities. Section 2.3.3 describes various activities undertaken by case study organisations in relation to strategy development, documentation and implementation.

5.3.3 Activities and implementation

Regional economic development organisations were described in section 5.3.1 as perceiving strategic planning as lacking relevance to their activities. This was followed by a suggestion in section 5.3.2 that these organisations were not very strategic. The limited intentional consistency described in section 5.3.2 is expected to follow through to the activities of case study organisations and the extent to which strategies were implemented. The remaining research questions relate to this and consider strategy selection, documentation and implementation processes.

In seeking a description of strategy processes in regional economic development organisations, the research question: *"How are strategies documented?"* was investigated. Section 2.9.3 suggested that strategies should be clearly stated in a formal document so that employees and stakeholders of the organisation could be aware of various projects within the region and support them (Pammer 1998). Each case study organisation had published strategies within a strategic or corporate plan. Strategies or goals were reported in a brochure in Case 2 and on the organisations' websites in Cases 1 and 3. Another formal document identified in chapter 2 was the implementation plan, which allocates implementation responsibility for all strategies and includes timing, budget and performance measures (Flavel & Williams 1996). Implementation plans were absent from Cases 1 and 3 and only partially present in Case 2. While each case study organisation had some form of strategic plan, there was little similarity in the way strategies were documented across the organisations.

Another research question asked: *"Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?"* In all cases, the answer to this question is no. Cases 1 and 3 did not have implementation plans. Case 2 had developed an annual operational plan, however, it

was not updated outside the budgeting process. The analysis in chapter 4 found that emergent strategies were not incorporated into strategic plans, so while each case had such a document, they were not up to date. This is probably a key reason for strategic plans not being perceived as relevant to the activities of the respective organisations.

The way in which new projects were adopted in all three cases did not encourage review and updating of strategic and implementation plans. The planning processes that led to strategic and implementation plans were seen as separate from the usual activities of the organisation. For example, an issue might have come from the community and been brought to the Board for discussion. Research applied to the discussion was generally focused on evaluating or supporting the issue or a proposed course of action. Evaluation of the issue related to the perceived impacts and benefits of the course of action in resolving the issue itself rather than how it could contribute to the achievement of the organisation's goals. The discussion sometimes considered impacts on other initiatives or goals, however, this tended to be inconsistent and accidental. Analysis of the options evaluation element found that options were not deliberately analysed according to how they contributed to the achievement of the strategic plan.

Implementation, progress reporting and evaluation occurred in the same way, on an issue or single project basis. Interviewees in all cases reported evaluating the success of individual projects as they were current and progressing. The measure of success was determined at the time of evaluating the progress of the project rather than prior to its commencement. There was also a lack of evaluation after a period of time to see whether long term outcomes were being achieved. The overall progress of the organisations was measured in the same way. In Cases 2 and 3, funding Key Performance Indicators provided predetermined measures that were applied every six months, however, as discussed in chapter 4, these measures were considered to be too

broad to be meaningful. A measure of organisational performance perceived as being more meaningful was community and member satisfaction with the way current issues were handled. As discussed in section 5.3.1, there may be a reluctance to set strategic measures in advance for fear of having to report a lack of long term progress.

Measures feature in the research question: *"Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?"* While regional organisations pursued activities that were specific, they were often not measurable or tied to a long term goal and they were only strategic when consistent with other activities being undertaken by the organisation. There may be a link between the absence of long term goals and the absence of an overall performance measurement framework that incorporates project measures developed prior to implementation. As suggested in section 5.3.1, without long term goals, the organisation is likely to be evaluated by various external parties against their own (potentially unrealistic or irrelevant) expectations.

Strategic plans have been identified as not relevant to the case study organisations and out of date. Consistent with this, was the lack of direct implementation of the strategic plans. Rather than being guided by predefined long term goals and agreed operating parameters, the organisations in all cases implemented projects aimed at satisfying influential elements of their community and membership, and thus justifying continued financial support. The organisations did not set long term goals and then schedule short and medium term milestones to achieve these goals. Instead, they seem to have adopted a number of short term projects that could be delivered once or many times and then replaced when new community and member demands arose. Maintaining these funding streams guided the direction of the organisation rather than the espoused reason for its existence.

This political behaviour suggests that there may be an unconscious strategy of pursuing short term organisational survival over long term outcomes. In following this strategy, the organisations were distracted from the original organisational purpose and desired outcomes. Contributors of resources expected certain outcomes, and these were numerous, conflicting and different from the organisation's agreed purpose. Two of the three case study organisations had taken on a broader membership to supplement their income. Both organisations also undertook activities not related to their original purpose because of the expectations of these members. Interviewees in both cases stated that they thought members probably did not understand what the organisation was meant to be achieving and that members had a distorted view of the organisation's purpose because of the short term activities undertaken to satisfy the membership.

The view that community and membership bases were clients to be satisfied by the regional organisation is relevant to the research question: *"To what extent are stakeholders involved in strategy implementation?"* The regional economic development organisations were perceived as delivering services to financial members. This suggests that the relationship between the organisation and members was as a service provider and recipient and the latter were therefore unlikely to be implementing strategies themselves. This was not supported by the research. While interviewees across all cases believed that the primary implementation responsibility was with the staff of the regional organisation, examples were given in each case of initiatives that community members or representatives of member organisations were actively involved in. These were often emergent initiatives, rather than projects identified in the strategic plan. While all case study organisations had produced a physical strategic plan at some stage, most interviewees confessed to not opening the document since it was finished. Stakeholder involvement in strategy implementation occurred, but to a limited extent.

Not all of the benefits of a modular organisation are being achieved. Section 2.4 suggests that the regional organisation is small in size and budget and can achieve much more by using the resources of member organisations (Daft 2004). There seems to be a reluctance to follow this principle, although the research did not identify whether the greater involvement of member organisations was specifically considered and rejected. In some cases implementation was shared by member organisations. This usually related to a commitment of resources such as the time of particular individuals, or the contribution of funding to an individual project (when specially requested).

A discussion of the strategy selection, documentation and implementation processes of the case study organisation confirms statements in section 5.3.1 that strategic planning is applied but only half-heartedly. The organisations were responsive and issue focused in their activities and implementation efforts. Implementation was motivated by anticipated community reaction.

5.3.4 Elements contributing to implementation

Processes followed by each organisation have been described and contextual factors that may be outcomes of the processes were identified. The research question: "W*hat elements of strategies relate to implementation?"* seeks the identification of relationships between elements and implementation of strategies. The discussion in sections 5.3.1 to 5.3.3 highlights elements that appear to have the greatest impact on the strategic effectiveness of the case study organisations. This led to the development of a tentative model depicting relationships between elements thought to have the greatest impact on the implementation of a strategic plan in regional economic development organisations. The model is presented at figure 11.
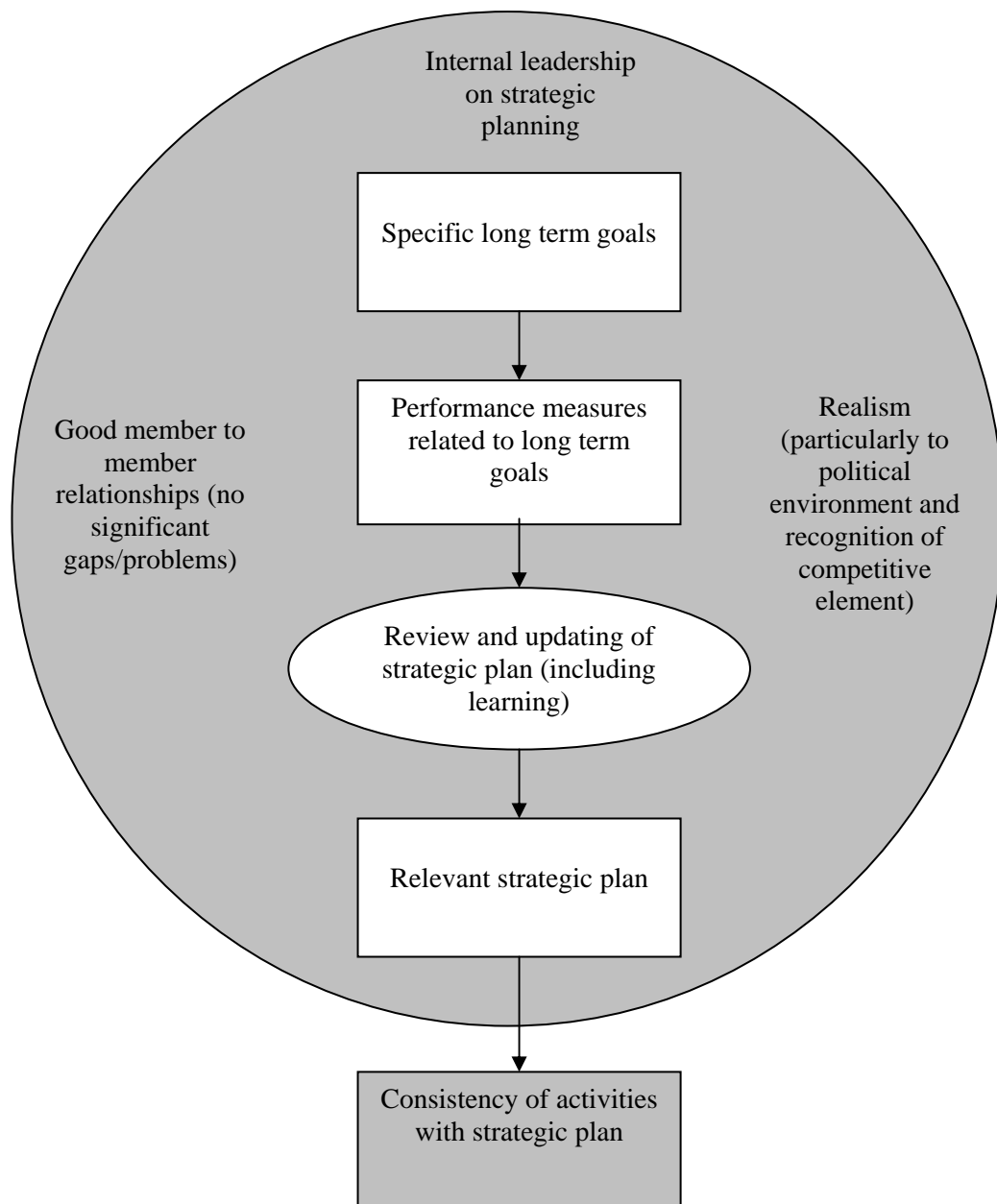
Figure 11: Elements contributing to implementation of strategic plan

Organisational elements and characteristics of elements that appeared to have the greatest significance were leadership on strategic planning (identified in section 5.3.1); good member to member relationships (identified in section 5.2); and a sense of realism, particularly in relation to the political nature of the internal environment (identified in section 5.3.1) and the competitive nature of the external environment (identified in

section 5.3.2). Process and output elements thought to have a relationship were the requirement for long term goals (identified in section 5.3.1); performance measures related to the long term goals (identified in section 5.3.3); an ongoing process to review and update the strategic plan (identified in section 5.3.3); and a continually relevant strategic plan (identified in section 5.3.1). The most significant implementation outcome was the element of consistency, where activities undertaken by the organisation have a consistency with the strategic plan (identified in 5.3.2).

While the model contains only a few of the elements presented in the theoretical framework in section 2.9, these elements are thought to be the most significant given the study findings. The exploratory, descriptive nature of the study means that confirmation of the inferred relationships between these elements was outside the scope of the project. The model in figure 11 (p.157) may provide the starting point for further research, which will be discussed in section 5.7.

5.3.5 Umbrella strategy

A complementary outcome for the study was to consider the applicability of strategy theory to regional economic development organisations. This has been done by considering planned strategy and emergent strategy as well as twenty seven individual elements. It can also be done in relation to the typology of strategies (Mintzberg & Waters 1998) presented in figure 2 (p. 45). The dynamic external environment and resulting need for flexibility within an area of concern identified in all three cases suggests that, of the types presented by Mintzberg and Waters (1998), umbrella strategy is most likely to be applicable. This type is found where organisational leaders set boundaries in relation to the direction the organisation is to move in and then monitor

decisions and adjust either the vision or decisions to ensure a consistent pattern is maintained.

The case study organisations' Boards have attempted to set boundaries, and have adopted a 'deliberately emergent' (Mintzberg & Waters 1998, p.26) approach to cope with changes in the regional environment. However, the lack of consistency discussed in section 5.3.2 still applies under this typology to indicate that a strategic approach is weak, if not missing. This is a concern, as consistency of activities with the strategic plan is identified in figure 11 (p. 157) as the outcome representative of successful implementation.

The application of the concept of umbrella strategy to the processes found in the three case study organisations is useful in the development of knowledge and the management of regional economic development organisations. In terms of expanded knowledge, utilisation of the umbrella strategy concept could become the basis for an alternate model to figure 12. The managerial implications of umbrella strategy will be addressed in section 5.5.

5.4 Summary of discussion

The results were discussed and applied to each of the research questions. In addressing the first research question, '*To what extent are stakeholders involved in strategy implementation?'*, section 5.3.3 suggested that stakeholders were involved in strategy implementation to a limited extent. The second research question, '*How do stakeholders perceive strategic planning?'* was addressed in section 5.3.1. It concluded that while stakeholders perceived the benefits of strategic planning, they did not feel that it was directly relevant to the operation of regional economic development organisations because it did not provide enough flexibility.

The third research question asked: *'What elements of strategies relate to implementation?'* This was tentatively answered in section 5.3.4, with the development of a model to depict elements thought to be the most significant, namely, leadership on strategic planning, good member to member relationships, realism, long term goals, performance measures tied to long term goals, ongoing review and updating of the strategic plan, relevance of the strategic plan and consistency of activities with the strategic plan. The need for further research to investigate these possible relationships was indicated.

After considering the fourth research question: *'Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?',* section 5.3.3 determined that regional economic development organisations rarely implemented specific, measurable and long term oriented strategies. *'How are strategies documented?'*, was the fifth research question. Section 5.3.3 stated that all case study organisations had some form of strategic or corporate plan, and that there was a mix of other documents such as brochures, web pages and implementation plans. The final research question queried: *'Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?'* A negative response to this question was provided in section 5.3.3, which concluded that only one case study organisation had an implementation plan and that updating of strategic plans did not occur.

An additional conclusion that was drawn, found that the approach seen in each of the case study organisations was most similar to umbrella strategy in the typology of strategies (Mintzberg & Waters 1998) presented in section 5.3.5. The case study organisations were confident about their activities and the results being achieved, but

the research revealed a number of opportunities to enhance practices. These will be discussed in section 5.5.

5.5 Managerial implications

The complexity of regional economic development organisations as collaboratives suggests that reaching agreement on matters is not an assumed outcome, yet the concept behind these organisations implies that they are expected to address regional issues more effectively and with fewer resources than government (Dore & Woodhill 1999; Holzapfel 1995; Kazi 1997; Miller & Ahmad 2000). A number of implications of the findings and suggestions to address them will be provided in section 5.5.1. These will relate to practices in regional economic development organisations and elements of regional economic development policy.

5.5.1 Implications for regional economic development organisations

A key finding was that the case study organisations were not working towards clear and measurable long term goals. One of the reasons why strategic planning was not considered relevant was that the short term focus of the organisations needed to shift to respond to changes in the external environment. The cumulative effect of strategy, where numerous consistent activities kept each organisation moving towards a particular goal (Hutchinson & Bretherton 2005) was weak in all cases and sometimes contradictory activities meant the organisations moved further away from achieving a goal. This reduced the ability of the organisations to impact on their environments.

Another significant finding was that stakeholders within the same case study organisation had different views as to how economic development should be approached. As a result, a number of participants had differing expectations for the

organisation and the General Manager/Executive Officer probably felt overwhelmed by the task of meeting these expectations. An outcome seen in all three case study organisations was that the organisations undertook a broad range of activities that were not strategic, but were adopted to meet as many expectations as possible.

A process to review, discuss and agree on some clear goals would enable various stakeholders of the organisation to identify and share their expectations (Zagotta & Robinson 2003). For example, the organisations could consider what difference must there be in the regional economy in ten, fifteen or twenty years for their effort to have been worthwhile and use those differences as the basis for long term goals. Having an idea of desired outcomes would enable the organisation to justify why it should be funded and supported on an ongoing basis, and might decrease the likelihood of other less strategic activities being adopted, just to meet the need for reportable outcomes.

The lack of clarity and direction impacted on the effectiveness of organisational resources. Interviewees in all cases felt that more could be achieved with greater resources, yet they did not suggest the alternative of applying current resources to a narrower focus (Miller, Wilson & Hickson 2004; Sterling 2003). One interviewee agreed that the area covered by the regional organisation was too large to enable it to be strategic with its level of resources and another stated that too many projects were taken on for any of them to be properly implemented. Realistic long term goals and clarity relating to a specific economic development approach would provide boundaries for the selection of projects that were likely to be more strategically effective with the same resources than the current wide range of activities being undertaken.

Application of the concept of umbrella strategy discussed in section 5.3.5 may assist with this challenge of too broad a focus. Umbrella strategy encourages the establishment of boundaries that serve to narrow the focus of organisational activities

(Mintzberg & Waters 1998). For example, Case 1 might recognise that a key approach is lobbying government and industry for infrastructure development in the region. Case 2 might provide a promotion, referral and information approach, linking local business and the outside world. Case 3 might adopt an enterprise facilitation approach where small businesses and people with ideas are supported in the early stages of their projects. Each case would set boundaries for activities that would guide ongoing decisions to be consistent with the purpose of their chosen approaches.

The need to provide outcomes to a diverse stakeholder base was one reason for this broad range of activities, however, this seems to be a side effect of not setting long term goals and developing a focused approach. By clarifying goals, the organisation can identify what outcomes it can realistically provide to stakeholders, and even whether some stakeholders are making a negative contribution by expecting outcomes that do not move the organisation towards its goals. Analysing and prioritising stakeholders (Bunn, Savage & Holloway 2002; Rampersad 2001) may be a difficult process, but it would free the organisation from time and resource intensive distractions and enhance its ability to deliver outcomes to the remaining majority stakeholders.

One concern raised by all cases was that outcomes were often long term but stakeholders expected short term deliverables. Meeting this stakeholder expectation is achievable. Once the long term goals have been set, it should be possible to break them into shorter term milestones (such as six monthly). This not only provides tangible outcomes to be reported to stakeholders, but an opportunity for genuine evaluation of the organisation's role. In the political environment of regional development, the presence of linked long and short term deliverables may add credibility to the organisation by displaying its commitment to achieving long term regional goals rather than short term wins for specific stakeholders.

Another missing opportunity is that of review. None of the organisations appeared to review their strategic plans or even their activities in order to understand what worked well and what did not meet expectations. Review provides an opportunity to recognise emergent strategy (Nielsen-Englyst 2003). Consistency in activities and impacts could be recognised and provide a basis for further activities to achieve even greater impacts. In terms of umbrella strategy (Mintzberg & Waters 1998), review could identify where activities are outside the strategic boundaries. Organisation leaders could choose to either change the boundaries to reflect a change in strategic direction, or cease the activities to avoid a dilution of strategic impact. A regular review could also show organisational strengths and may lead to identification of a competitive advantage.

Another important aspect of review is the opportunity for learning. Interviewees in all cases talked about the difficulty of economic development and the perception that impacts were often intangible. In terms of the maturity of strategic approaches, it appears as though the organisations had only been operating for a year or two, yet one had been established for twenty years. The lack of review meant that lessons were not learned from past activities (Olsen & Haslett 2002) and potentially the same approaches were being tried again with limited results. There was a lack of awareness of why particular initiatives worked, which made it difficult to replicate them and achieve those good results again. Learning is a key benefit of emergent strategy (Mintzberg 1994), yet it was not recognised.

Another related area was the lack of application of specific tools to overcome identified challenges. Interviewees in all organisations had talked about the difficulty with predicting and planning, yet it was an interviewee outside one organisation that suggested considering different scenarios. None of the organisations appeared to have tried a scenario approach to overcome the difficulty caused by a dynamic external

environment, or tried a program of research and forecasting. All cases expressed concern about their limited resourcing, yet none of the cases applied ordered priorities to ensure resources were allocated where they would have the greatest impact. There are a wide range of tools available (Rigby & Bilodeau 2005) yet very few of them have been used.

The study acknowledges that regional economic development organisations face significant challenges. To overcome these challenges, the organisations must agree on specific long term goals as well as selecting and applying a particular economic development approach. This would provide a clearer focus for their efforts. The organisations would also benefit from regular review of goals, strategies and completed projects, with an emphasis on learning (Olsen & Haslett 2002). The wide range of strategy and management tools available (Rigby & Bilodeau 2005) to regional organisations could also be considered to assist them to overcome various challenges faced.

5.5.2 Collaboration in practice

The case study organisations displayed some collaborative behaviour which could be enhanced through a greater understanding of what collaboration is and what makes it effective. The impact of positive relationships and trust was highlighted when the three cases were compared. Case 1 expected a strong future and had very positive relationships and a high degree of trust between participants. Case 3 was in danger of losing its significant funding and had some negative relationships and very limited trust. A greater awareness of the importance of relationships and trust might assist this organisation to address those negative relationships and ensure that all critical

stakeholders are committed to the organisation (Faerman, McCaffrey & Slyke 2001; Mangan 2001; Salmon 2004).

Collaboration allows for different stakeholders to achieve individual goals through the regional body, however, there is a greater chance of trust forming if those goals are known (Faerman, McCaffrey & Slyke 2001; Salmon 2004). Also, there must be agreement as to what the shared activities of the organisation are and what is outside its scope so that stakeholders can feel confident that the organisation can not easily be manipulated to achieve a partner's goals at the expense of their own (Raco 1999; Salmon 2004). As discussed in section 5.4.1, the stakeholders of a regional organisation, particularly the Board members, need to share their goals and expectations regularly in order for collaboration to work effectively.

Another important aspect of collaboration is leadership (Faerman, McCaffrey & Slyke 2001). Case 1 displayed leadership with respect to involving key community leaders in the region and Case 2 to a lesser extent, however, none of the cases experienced leadership in strategic planning. While the Chairs of the Boards of each case study organisation were perceived as doing a good job, this was more to do with being inclusive of all players at meetings than leading and inspiring the group. Stronger strategic leadership within the Board would be beneficial, provided the leader is respected (Faerman, McCaffrey & Slyke 2001; Thompson et al. 2002).

5.5.3 Implications for regional economic development policy

The research found that the main focus of the case study organisations seemed to be on maintaining funding streams in the short to medium term and that their activities were aimed towards short term outcomes. While it is inevitable that economic development policies and funding will continue to change over the long term (Collits 2004; Kazi

1997), there needs to be recognition of the incongruity of expecting changes in long term economic drivers while making a short term commitment to changing the drivers. Current funding and evaluation mechanisms did not appear to encourage or support long term strategic planning. This inconsistency has compounded the difficulty for regional economic development organisations to set and consistently work towards long term goals.

State government policy has encouraged the development of a financial membership base in Cases 2 and 3. The aim behind this may be to develop a long term, sustainable funding source, however, the research found that maintaining this membership diluted the focus of the organisations and tied up resources in non-strategic activities. Further investigation of the costs and benefits of a financial membership base could provide more information on this matter and is mentioned as a potential topic for future research in section 5.7. As suggested in section 5.5.1, clarifying member expectations with respect to deliverables may assist in gaining greater focus (Pammer 1998), however, this may result in some members withdrawing due to a lack of interest in the long term outcomes.

An alternative may be for the role of regional economic development organisations to be focused on networking and communication. Ownership of long term strategies could remain with the funding bodies, with the regional organisations serving as expert panels, consulted on regional issues and implementation considerations. This arrangement is likely to be considered less desirable by stakeholders, as there would be a fear of decisions being made for the region, from outside it. It would also be a reversal of recent policy directions (Collits 2000; Kazi 1997).

Another alternative is to recognise that high expectations are placed on the staff and Board members of regional organisations without recognition of the need to provide

support mechanisms for these individuals. This support could be provided through a practitioners association or professional body, as has been suggested by some players (Dowling 2005) but not implemented at the time of this study. If the funding bodies required a specific approach to economic development, an industry body could provide training in that approach. The current policy expectation seems as though participants in regional economic development should know what to do, despite the fact that most are involved through their interest in the region rather than their expertise in regional economic development.

5.6 Limitations of the research

Limitations of the research are related to its scope - that it is a single, exploratory study at a particular point in time. The results present a summary of processes that occurred at the time of data collection, as perceived through a limited number of interviews and documents. It was beyond the scope of this study to review all documents produced that relate to the regional organisations involved, or to interview every stakeholder involved. While there was diversity in stakeholder positions and opinions, there is a possibility that other views exist or that interviewees were not representative of all stakeholders.

The large number of elements investigated meant that none could be studied in great depth, however, their presence or absence was identified and they were described within the organisational context. As the aim of the study was to explore and describe, indicative results are appropriate. Future researchers can review the data provided by this study and hypothesise about potential relationships for more detailed examination.

5.7 Directions for future research

A number of directions for future research have been indicated in the discussion of the methodology and in the conclusions. Section 3.1.1 stated that the study would result in information that could be useful as the basis for the development of tools to assist regional organisations to apply strategy. Besides a detailed description of the presence and absence of elements across three cases, the research also provided two potential models that could be further developed as useful strategic tools. The first of these was figure 11 (p. 157), which depicted potential relationships between elements thought to be the most significant in contributing to the implementation of the strategic plan. Explanatory or predictive research could be undertaken to confirm these relationships and develop the model into a useful tool for regional economic development organisations.

Section 5.3.5 identified umbrella strategy in Mintzberg & Waters' (1998) typology of strategies as having a potential application in the regional context. Further investigation of the applicability of this concept and resulting implications for policy and practice, would also contribute to the achievement of the ultimate research aim of enhancing stakeholders' abilities to influence their regions' future. There is also an opportunity to consider whether the two proposed models could be combined.

There are numerous other options for future research. To gain a deeper understanding of the subject, the research could be replicated in other states and countries to identify similarities and differences across a more diverse population of regions. Replication at a future date would provide a longitudinal study, and awareness of the way processes and contextual factors have changed over time. Other suggestions for future research include how individuals impact on the effectiveness of regional economic development

organisations; a detailed examination of how emergent strategy is applied; and an evaluation of strategic effectiveness by regional organisations with a more planned or more emergent approach to strategy. It would also be worthwhile to evaluate the costs and benefits of a financial membership base, as highlighted in section 5.4.3. Due to the broad scope of this exploratory study, there are many options for future research.

5.8 Conclusion

The study has deepened understanding on collaboration and strategy processes within Queensland regional economic development organisations by providing a detailed description of how strategy elements apply in three cases. While exploratory in nature, the study lays the foundation for future research aimed at enhancing the strategic capability of regional organisations. Chapter 5 built on the results presented in chapter 4 to provide a description of strategy processes and implementation efforts in regional economic development organisations. The concern regarding the lack of implementation of strategic plans was supported and the elements thought to have the greatest impact on implementation were incorporated into a tentative model that could be further investigated through explanatory research.

The applicability of strategic planning to overcome challenges in the regional context was confirmed, however, the study found that a need for flexibility to cope with a dynamic external environment led to the case study organisations following a responsive, rather than strategic approach. The concept of umbrella strategy was thought to have potential as an approach that allowed this flexibility, while maintaining a strategic impact on outcomes.

Translated to managerial implications, the chapter concluded that a key concern in the management of regional economic development organisations and collaborative

relationships within these organisations was a lack of clarity regarding the specific purpose, long term goals and preferred economic development approach to be taken by the case study organisations. This was perhaps related in part to the current policy framework in that the short term nature of funding provided to these organisations did not encourage long term planning. Should the role of regions as an additional layer of government in Australia continue as suggested in chapter 1, longer term funding arrangements will become essential. The growing need for regional self-reliance and action must be met by increased confidence in strategic planning practices. Hopefully this study will contribute to the ongoing development of strategic practice in regional organisations.

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APPENDICES

Appendix A: Case study protocol

Introduction

This case study protocol follows suggestions made by Robert K Yin (2003, Case study research design and methods, 3rd edn, Thousand Oaks, Sage Publications Inc). The role of the protocol is:
- to ensure consistency in research by providing guidance during various stages
- to leave a record of methods applied
- to act as a quick reference document on project concepts

The protocol relates to the methodology and analysis components of the study.

Research Details

This research is being undertaken to fulfil the requirements of Master of Business (Research) at Central Queensland University. It covers the period August 2004 to June 2006.

The Research Questions

The overall objective of this study is to explore and describe strategy processes and strategy implementation in a regional context. This involves consideration of the following:
- To what extent are stakeholders involved in strategy implementation?
- How do stakeholders perceive strategic planning?
- What elements of strategies relate to implementation?
- Do regional economic development organisations implement strategies that are specific, measurable and tied to a long term goal?
- How are strategies documented?
- Are emergent strategies incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?

Summary of Research Methodology

The research methodology incorporates the following components and processes:
- 3 case studies
- 6 semi-structured interviews for each case study
- analysis of key documents for each case study
- seeking evidence of presence and absence of elements in theoretical framework
- describing how elements appear in the context

Operationalisation of Theoretical Framework

The study involves deductive research including semi-structured interviews and a document analysis to determine the presence or absence of elements of a theoretical framework. The way in which elements are interpreted affects conclusions regarding their presence or absence. Table 1 provides detail of the interpretation used for this study.

Table 1: Operationalisation of theoretical framework

Strategy Element	Description	Interpretation
Organisational		
Leadership	regional leadership on economic development	Are community leaders involved? Do people see the organisation as a leader? Are there other regional economic development bodies?
	leadership on strategic planning	Is someone driving strategy processes on an ongoing basis?
Purpose	shared understanding of general purpose of organisation	Do people seem to have the same impression of the general purpose? Are similar words or concepts used to describe it? Are the same words used in documents?
	shared understanding of specific goals of organisation	Can interviewees give the same details about why the organisation exists and what outcomes it ultimately wants to achieve? Are these specific or general? Are these reflected in any documents?
Member to member relationships	a strong relationship between members, including awareness of each other	Do most interviewees refer positively to other members? Are relationships thought to be good? Is there a sense of trust?
Roles and responsibilities	clarity of roles and responsibilities within and for the organisation	Is there a shared sense of the actual role of the organisation, including what may be within it and outside it? Do the roles and responsibilities of individuals within the organisation seem to be well understood?
Implementer involvement	involvement of implementers in strategy formulation	Who is involved in implementing decisions? Did they have input into the formulation of the strategic plan?
Process		
Knowledge	knowledge generation and sharing in relation to specific projects	Is knowledge sought in relation to specific projects? Is knowledge shared within the organisation in relation to specific projects?
	general knowledge generation and sharing	Is knowledge sought in relation to the overall economy, performance of the organisation, and competitors? Is theory or expert advice sought? Is this knowledge shared within or outside the organisation?
Analysis	project or issue focused analysis	Is knowledge applied and considered in relation to specific projects or issues? Are any tools used to aid analysis in relation to projects or issues?

	analysis based on economic drivers, including competition	Is knowledge based on economic drivers, competition, theory, external advice and the performance of the organisation applied and considered in relation to the overall strategic direction of the organisation and its activities? Are any tools used to aid analysis? For example, considering possible scenarios of different actions and the outcomes that each might have. Considering possible future scenarios and how they might impact on the organisation. Comparing the organisation to other organisations. Considering outside organisations and their motivations and possible actions.
Options evaluation	options evaluated in relation to strategic plan	Are different options considered before making a decision? Are these options evaluated in relation to how they contribute to achievement of the overall strategic plan or the organisation's long term goals?
Emergent strategy	emergent approach	Are there consistent decisions made that are aimed at achieving specific organisational goals? Are there actions, plans or projects that are agreed in response to analysis or changes in the internal or external environment or projects that are not specified in a strategic plan?
	recognition of emergent projects in strategic plan	Are these projects included in the strategic plan after being taken on?
Monitoring of progress	project specific monitoring of progress	Is the progress of specific projects or initiatives monitored in any way?
	monitoring of progress in relation to strategic plan	Is the progress of the organisation against its strategic plan monitored in any way?
Review	review of strategic plan/direction	Is there a regular review of the strategic plan or direction of the organisation? Is there ever a review?
Reference to strategy	constant reference to strategy	Is the strategic plan regularly referred to by members and staff? Is it referred to at all?
Outputs		
Vision	a meaningful, clear, shared vision for the organisation	Is there an agreed future that is perceived as the aim of organisational efforts? Is this incorporated into a vision statement? Is it visual/able to be imagined from the description? Is there a shared awareness of this vision?
Long term plan	a specific, agreed long term plan or goals	Are there any intended actions over a time horizon of greater than 5 years into the future? Does this include desired outcomes of the actions in some form? Is there a shared awareness of this plan?

Formal document	a formal document that outlines the long term plan and strategy	Is the organisation's strategy and planning published in a formal document? Who has a copy of the document?
Priorities	ordered priorities	Are key strategic areas indicated by ordered priorities? Is this used as a guide for activities and new projects?
Performance measures	project specific performance measures	Performance measures involve determining how the organisation will tell if something has been successful. Are specific measures agreed before a project of initiative is started?
	overall performance measurement framework	Is there an overall set of measures tied to the long term plan and linking to projects and activities, determined in advance to indicate whether an organisation is successful?
Implementation plan	implementation plan	Is there a single implementation plan that records decisions about what activities must be undertaken to achieve the long term plan, who is responsible, what priority the activity is, when it is to start and finish and how success will be measured?
Communication of strategy	communication of strategy	Is the organisation's strategy and long term goals communicated to the membership base and general community? How often and how?
Characteristics		
Realism		Does the plan take account of challenges in the context? Are goals thought to be realistic given available resources?
Relevance		Is the plan relevant to the activities of the organisation? Are the activities relevant to members? Are processes relevant?
Creativity		Is the status quo ever challenged? Are different ways of approaching an issue considered? Are different options put forward? Is there debate over options? Are tools such as brainstorming or scenarios used?
Clarity		Are strategies, statements, measures, goals, etc specific enough that there is only one possible interpretation?
Consistency		Are activities consistent with the strategic plan or each other? Are processes used consistently? Are measures applied consistently?
Complementarity		Are there activities or projects initiated outside the organisation that complement those of the organisation, particularly in terms of achieving long term goals? Is there awareness of interrelationship of activities and potential synergies?

Data collection procedures

Case Selection

The research follows a case study approach. Case selection is based on the following process, depicted in figure 1.

Identify all regional organisations that:
- are located in Queensland
- operate in non-metropolitan areas
- are within 750km of Rockhampton
- are linked to a geographic area
- are formal organisations
- incorporate three or more local government areas
- are focused principally on economic development

Potential cases are then described against the following items:
- population of region
- regional population growth rate
- location
- regional characteristics
- membership base

A set of 3 preferred cases that display a combination of different characteristics described above are to be identified. Alternate cases that allow for differing characteristics will also be identified on the chance that original cases decline involvement.

Focus on defined geographic area

Three or more LGAs

Formal, collaborative organisation

Primary aim of economic development

Population of possible cases

compare and contrast

population, growth rate

regional characteristics /location

membership base

Case 1

Case 2

Case 3
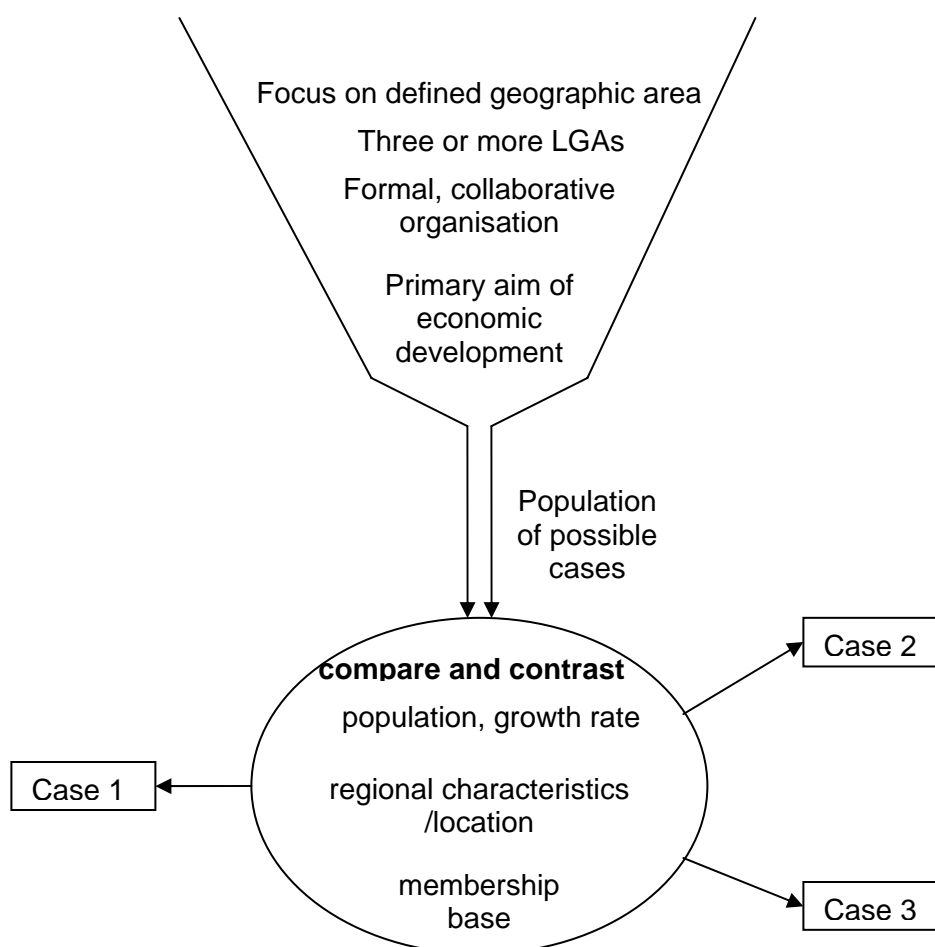
Figure 1: Process for selection of cases

Access to cases and informants

Once cases are identified, they are to be contacted to confirm support of the research. Also, six interviewees for each case will be identified, contacted and agreement to participate sought (interviews may involve two informants if necessary). This process is outlined in figure 2.
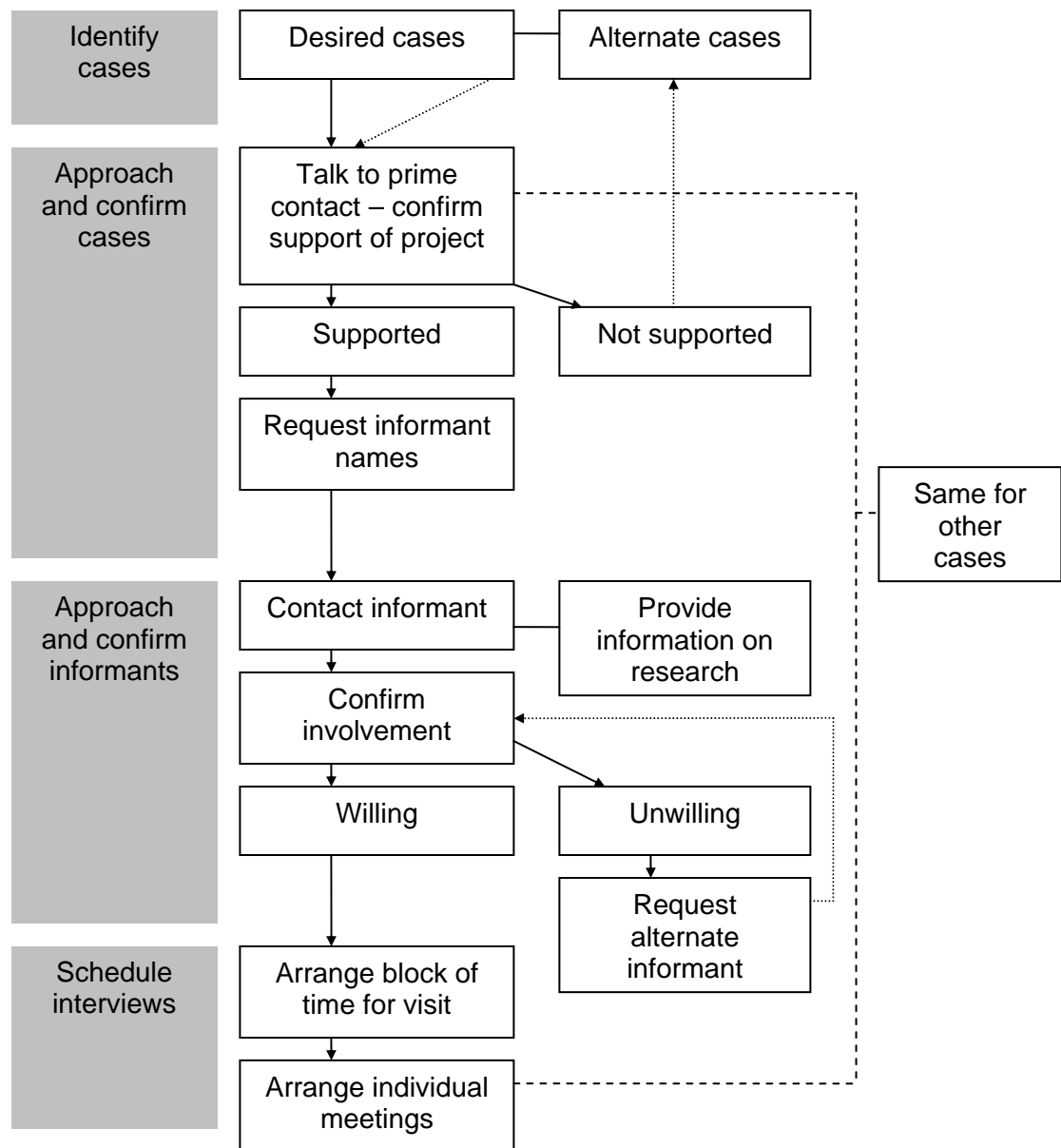
Figure 2: Process to contact cases and informants

Information on research provided to informants

The standard letter to be provided to prospective case study organisations is at Attachment 1 and the standard letter to be sent to potential informants is at Attachment 2. The Consent Form to be sent to all interviewees is at Attachment 3.

Interview questions

The key method of data collection is the semi-structured interview. The interview sheet, including key questions and optional probe questions, is at Attachment 4.

Interview transcripts will be prepared for every interview.

Document list

Besides interviews, a document analysis will be undertaken for each case. Following is a list of documents to be initially sought for the document analysis:

- corporate plans
- regional plans
- regional strategies
- funding acquittal reports
- funding proposals
- webpages
- annual reports
- government agency annual reports
- newsletters
- newspaper articles
- role statements
- membership lists
- terms of reference
- operational procedures

Within Case Data Collection and Analysis

The interview transcripts will be reviewed and comments and page references typed into an array as shown in table 2. This involves identifying any comments that relate to particular elements, as well as challenges faced in applying strategic planning in a regional context.

Each case will involve an array that sets out comments against elements for every interview.

Table 2: Array for element analysis

Element	Interview 1	Page ref	Interview 2	Page ref	…
Organisational elements					
Leadership					
Shared understanding of purpose and goals					
…					

The member organisation's documents reviewed for the study will be recorded in the array shown as table 3. Any reference to the regional organisation and regional projects are to be noted, as well as general comments. Each case involves one array that sets out all documents reviewed, by member organisation.

Table 3: Array for document analysis

	Reference to regional organisation?	Reference to regional projects?	Comments
Organisation 1 Document 1 Document 2			
Organisation 2 Document 1 Document 2			
…			

Any organisational or regional plan found in the document search will be input into the array shown as table 4. Where possible, projects from documents and interviews can be inserted against strategies or objectives to identify linkages.

Table 4: Array to align projects with plans

	Plan detail	Strategies	Projects	Projects cont'
Vision				
Mission				
Core skills				
Role				
Goals/objectives				

A review of documents and interview transcripts will identify projects that the regional organisation is/was involved in. Where easily found, detail about these projects can be input into the array shown as table 5 (note: time constraints may limit the ability to research details for every project).

Table 5: Array for data collection on projects

Project Name	Project Type (planned/ emergent)	Purpose	Goals	What it actually involves	How it contributes to regional goals	Status
Project 1						
Project 2						
…						

Once the data has been input into the arrays above, a process of analysis will be undertaken that involves writing individual case reports. These reports will follow the structure:

1. Describe case
   - Provide an overview of the region
   - Provide an overview of the regional organisation, including its history

- Explain the characteristics of interviewees for this case
2. Discuss the use of strategic planning to achieve the organisational purpose
   - Describe the purpose of the organisation
   - Describe why the various stakeholders believe the organisation uses strategic planning
3. Consider each element
   - Conclude whether each element is present based on evidence for and against
   - Describe how the element is present in terms of what form it has and to what extent it appears
4. Describe the overall strategic planning process/es
   - Identify where in the process each element fits and whether any appear to overlap/relate
5. Conclude case
   - Describe the extent to which implementation appears to have occurred
   - Discuss factors that stakeholders believe might have contributed to this
   - Identify any potential relationships between elements in the process and implementation
   - Discuss how well the process applied appears to suit the expectation for strategic planning in achieving the organisational purpose

These case reports will be sent to the regional organisations for an opportunity to check conclusions and provide additional evidence, if required.

Cross Case Data Collection and Analysis

Each element for each case is to be summarised into the array shown in table 6. These will be put side to side and include evidence for the presence and absence of each element.

Table 6: Array for comparison of cases on summary comments

	Summary comments		
	Case 1	Case 2	Case 3
Organisational elements			
Regional leadership on economic development			
Leadership on strategic planning			
…			

A conclusion will then be made regarding the presence and absence of each element. This is recorded in the array shown in table 7, along with quotes from the interviews that support either the conclusion or describe how an element is present.

Table 7: Array for cross case discussion

	Conclusion regarding presence (y, n, p)			Supporting quotes		
	Case 1	Case 2	Case 3	Case 1	Case 2	Case 3
Organisational elements						
Regional leadership						

on economic development					
Leadership on strategic planning					
…					

Cross case analysis can be written up by considering the following items:

1. Compare descriptions of cases
   - Identify key similarities
   - Identify key differences
2. Consider each individual element across the cases
   - Identify similarities and differences
   - Consider whether contextual factors might relate to similarities and differences
   - Consider whether any conclusions can be drawn about the presence or absence of particular elements across all cases
3. Compare overall strategic planning processes
   - Identify similarities and differences
   - Consider whether contextual factors might relate to similarities and differences
4. Compare groupings of elements
   - Identify similarities and differences when elements are grouped
   - Search for the presence or absence of combinations of elements
5. Conclude
   - Describe key areas of similarity and difference across cases
   - Address the research questions
   - What aspects of strategies relate to implementation?
   - Is it the case that strategies which are specific, measurable and tied to a long term goal are more likely to be implemented?
   - Do strategies need to be documented?
   - Should emergent strategies be incorporated into implementation plans when they are more relevant to stakeholders than existing strategies?
   - Does it appear possible that one model could be developed to cover strategy processes in these organisations?
   - In general, does the theory apply to this context or are there particular differences?
   - What questions could be answered by further research?

Attachments following:

1. Standard letter to be provided to prospective case study organisations
2. Standard letter to be sent to potential informants
3. Consent form to be sent to all interviewees
4. Interview sheet

Central Queensland
U N I V E R S I T Y

Date

Regional organisation
Address

Dear…

RE: Request for assistance with research on regional strategy processes

My name is Tanya Hutchinson and I am a Masters candidate at Central Queensland University. At the moment I am preparing a thesis on strategy processes in Queensland regional economic development organisations. I have written to you because I am interested in the strategy processes applied by [*regional organisation*] and am seeking your involvement in my research.

The purpose of my study is to contribute to the ability of regional organisations to develop and implement strategy by looking at what strategy processes are being applied in different regions and to what extent regional strategies are being implemented. This exploratory study is expected to be useful in a number of ways. It will:

- assist regional organisations to understand what different approaches are being used by other organisations and what effect these approaches are thought to have.
- examine how relevant the current theory on strategy is to regional organisations.
- explore whether there are ways regional organisations can enhance their strategy processes to increase stakeholder involvement in implementation of their strategies.

I would like to undertake an individual case study on the strategy processes applied in your organisation and I am seeking your support. The conduct of an individual case study will involve:

- a general description of the region and regional organisation (size, attributes, structure)
- interviews with six members of the regional organisation, including yourself (one face to face interview with each member of approximately 90 minutes duration)
- a review of documents relevant to strategy processes in your region (such as corporate plans, regional strategies, funding acquittals, annual reports)
- preparation of an individual case report that describes the strategy processes used, which strategy elements are present and to what extent implementation occurs
- comparison of four different regions to identify similarities and differences
- conclusions about which elements might relate to stakeholder involvement in implementation.

Besides indicating your support, you may be able to assist me by identifying potential interviewees and documents related to the strategy process that are not publicly available.

…/2

The support of your organisation is essential to this study and no further contact within the region will be initiated without this support. Your right to withdraw this support at any time during the study is recognised. Further, you will be provided with a draft copy of the individual case study report for your region and an opportunity to comment on this report before it is finalised.

I am aware of the need to treat findings with the utmost confidentiality. No source, individual or organisational, will be identified or comment attributed without the express permission of the originator. The intended output of my study will be a thesis and conference publications explaining my findings. As per Central Queensland University's Code of Conduct for Research, all data generated during the study will be stored in a secure location for a minimum of five years.

Please consider my project and indicate whether you support the exploration of your region as an individual case. I hope you are able to help me and should be grateful if you would reply in writing or by email as per the contact details on this letter. If you prefer to talk to me first, please contact me on 07 4923 2638 or email me at t.hutchinson@cqu.edu.au. Please contact Central Queensland University's Office of Research (telephone 07 4923 2607) should there be any concerns about the nature and/or conduct of this research project.

I look forward to hearing from you and I am keen to learn more about strategy processes in your region.

If you require any further information please do not hesitate to get in touch.

Yours sincerely,

Tanya Hutchinson
Principal Researcher

Mobile Number:
0408 069 259

Email Address:
t.hutchinson@cqu.edu.au

Postal Address:
Faculty of Business and Law
Building 352
Central Queensland University
Bruce Highway
NORTH ROCKHAMPTON QLD 4701

Central Queensland
U N I V E R S I T Y

Interviewing on regional strategic planning processes
Information sheet

Dear Sir/Madam

Thank you for taking the time to consider participating in my research project. My name is Tanya Hutchinson and I am a Masters candidate at Central Queensland University. At the moment I am preparing a thesis on strategy processes in Queensland regional economic development organisations.

The purpose of my study is to contribute to the ability of regional organisations to develop and implement strategy by looking at what strategy processes are being applied in different regions and to what extent regional strategies are being implemented. This exploratory study is expected to be useful in a number of ways. It will:

- assist regional organisations to understand what different approaches are being used by other organisations and what effect these approaches are thought to have.
- examine how relevant the current theory on strategy is to regional organisations.
- explore whether there are ways regional organisations can enhance their strategy processes to increase stakeholder involvement in implementation of their strategies.

Your experience with regional strategy processes will be valuable to this study by assisting me to identify how they occur in your region. Your participation is especially valuable to this, the pilot study of the project, which aims to test its research methodology.

I am aware of the need to treat findings with the utmost confidentiality. You will be anonymous and you will not be identified in any study publications. Further, no source, individual or organisational, will be identified or comment attributed without the express permission of the originator. The intended output of my study will be a thesis and conference publications explaining my findings.

Participation is entirely voluntary and a decision not to participate will not affect your employment standing. You may withdraw from the study at any time by notifying myself or the Office of Research (see contact details below). As per Central Queensland University's Code of Conduct for Research, all data generated during the study will be stored in a secure location for a minimum of five years.

…/2

I would be grateful if you can spend approximately one and a half hour in an interview with me. I hope you are able to help me and if you are willing to participate, please complete the attached consent form, which I will collect at the interview. If you prefer to talk to me first, please contact me on 0408 069 259 or email me at t.hutchinson@cqu.edu.au. Please contact Central Queensland University's Office of Research (telephone 07 4923 2607) should there be any concerns about the nature and/or conduct of this research project.

I look forward to meeting you and learning more about strategy processes in your region. If you require any further information please do not hesitate to get in touch.

Yours sincerely,

Tanya Hutchinson
Principal Researcher

Mobile Number:
0408 069 259

Email Address:
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Postal Address:
Faculty of Business and Law
Building 352
Central Queensland University
Bruce Highway
NORTH ROCKHAMPTON QLD 4701

Central Queensland
UNIVERSITY

Interviewing on regional strategic planning processes

Consent form

I consent to participation in this research project and agree that:

1. An Information Sheet has been provided to me that I have read and understood;

2. I have had any questions I had about the project answered to my satisfaction by the Information Sheet and any further verbal explanation provided;

3. I understand that my participation or non-participation in the research project will not affect my academic standing nor my employment;

4. I understand that I have the right to withdraw from the project at any time without penalty;

5. I understand the research findings will be included in the researcher's publication(s) on the project and this may include conferences and articles written for journals and other methods of dissemination stated in the Information Sheet;

6. I understand that to preserve my anonymity and maintain confidentiality of participants that fictitious names may be used in any publication(s);

7. I am aware that a Plain English statement of results will be available on the web address provided in the Information Sheet;

8. I agree that I am providing informed consent to participate in this project.

Interview time: ....   Interview date:...................................

Interview venue: ....

Signature: ....

Name (please print):...

Consent form continued overleaf

☐ I wish to have a Plain English statement of results posted to me at the following address:

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....

Researcher contact details

Tanya Hutchinson (Principal Researcher)   0408 069 259
t.hutchinson@cqu.edu.au

Please contact Central Queensland University's Office of Research (Tel 07 4923 2602) should there be any enquiries about this study.

Interview Sheet

Case No:

Date: ....

Time: ....

<u>Follow up</u>

Action: **By when:**

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1. In what capacity are you involved in the regional organisation?

- How long have you had this role?
- What can you briefly tell me about the history of the organisation?
- Why are you involved and do you think this is the same for other members?

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2. What is the purpose of the organisation?

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3. How does a strategic approach help the organisation to achieve this purpose?

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4. Can you describe the ways the organisation plans for the region's future?

- Is there a vision? Are there long term goals?

- How were they developed/agreed? Who was involved?

- Is there any documentation on any elements of the strategic planning process?

- Have any strategies ever come from your vision or long term plan rather than in response to something that's come up?

- What proportion would you say are like this?

- How much creativity do you think there is in your strategic planning?

- If a strategy is developed in response to something, at what stage does it get written into any formal strategy documents and taken account of in budgets and priorities?

- When you're developing strategies, or when you're considering a new project, are you ever choosing between different options or are you generally assessing whether or not to do something in particular that has been suggested?

- How do you make this decision? is there a form or consistent process that you use?

- What sorts of information do you base these kinds of decisions on?

- Are ordered priorities set? why/why not?

- At what stage are implementation actions, responsibility and timing agreed? if there are no priorities, what are those decisions based on instead (particularly resource allocation)?

- How does everybody know who is involved in implementing a strategy and/or when it is expected to be completed? (eg. who is implementing this strategy? do they know what is expected of them?)

- Are these plans ever reviewed? How does that occur?

- Has this document changed since it was adopted?/Have any of these strategies changed since they were agreed? Why isn't the strategy document updated?

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5. How do you measure performance in relation to achieving your vision and goals?

- Quantitative or qualitative?

- Do you decide in advance how you're going to know if something has been successful?

- When you're considering a new initiative, do you ever discuss specifically what you want to get out of the initiative – why it is being considered?

- Do the people who are involved in implementing a project have input before a strategy is finalised?

- Where do the measures come from?

- Have you applied these measures recently? can I see an example?

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6. Which strategies have been implemented or are currently being progressed?

- What are some projects that have been completed?

- What are some key projects currently underway?

- How do they relate to the vision and long term plan?

- Is implementation responsibility always internal?

- Do the people implementing the strategy understand how what they're doing will contribute to the vision? Is their primary focus on the project itself or helping to achieve the vision?

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7. How are other organisations involved in implementation?

- Are there things that other organisations can do to help get a better outcome on particular projects, and things that might actually decrease the effectiveness of the project?

- Does that ever happen – projects being helped or hindered by others? Why does this happen?

- Can it ever be linked back to a lack of understanding or commitment to the organisation's strategic priorities?

- Does your organisation deliberately consider the regional priorities and strategies when making decisions about new projects/undertaking its own planning? What is the outcome of this?

- How often do you refer to the strategic plan or consider the regional priorities?

- Does your organisation refer to regional priorities and projects when communicating with staff, clients or funding sources (eg. other levels of government)?

- What processes or tools help your organisation to make decisions that complement what the regional organisation does?

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8. What are some of the challenges in undertaking strategic planning?

- What parts of the process could be improved to help the organisation to have more success with implementation?

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Case Report

Case 1

Overview

Purpose of this report

This report has been prepared for, [*General Manager/Executive Officer*], [*Regional Organisation*] for the following purposes:

- to share raw findings of the research to date

- to provide a basis for further discussion, particularly on any elements that need reconsidering

- to identify gaps in the document analysis

As with all stages of the research project, participation in a review of this report is optional, and a lack of response will be interpreted as no further comment necessary.

Publication of results

This report has been produced specifically for the above purpose. Any information from this report to be used in my thesis or other publications of results will not use the name of the organisation or refer to any individuals in the region by name.

Requested action

It would be greatly appreciated if [*Name*] could read this report and contact me either by email or phone to suggest any amendments to the report, including any elements that need to be reclassified in terms of being present or absent. While the suggested reclassification may not be adopted in every situation, feedback from [*Name*] will be given full consideration. If there are any gaps or corrections related to a key document being missing from the document analysis, it would be appreciated if a copy of that document could be provided. All documents not publicly accessible (eg. available on the internet) are treated as confidential and stored in a secure location.

Further reports

The thesis will involve analysis of the results and conclusions and recommendations across all three cases. A general summary of results will be provided to all interviewees.

Case results

Background

At the time of undertaking the case study, the [*Regional Organisation*] was concerned with an area incorporating four local government areas. Since collecting data in June 2005 this area has grown to incorporate a fifth local government area, however, this will be excluded to maintain consistency with the case at the time of data collection.

The region is a rural area, with its economy based heavily on agriculture and mining (OESR) and is located more than 300kms from the coast. It covers an area of 64,005 km^2 with an estimated resident population of 19,997 (2004p OESR).   In the year ended June 2005, building approvals totalled $39.6m and residents had a mean taxable income of $44,295, above the Queensland total. In other words, it is a large region with a small but relatively wealthy population.

The [*Regional Organisation*] was established in July 1997 for the purposes of increasing local government involvement and control of development efforts.   Accordingly, the organisation has a restricted membership of four local government authorities. It receives local government and private sector funds for its general operations and a mix of local, state, federal and private sector funds for specific projects. The organisation is supported by a small office and activities are overseen by a Board of Directors who represent the membership.

The preparation of this case involved six interviewees comprising a mix of staff and local government and private sector members. There was diversity in the interviewee group with some members having a short history with the organisation (12 months) and some having been involved since formation (5 to 6 years).

The general impression gained during the interviews is that members are satisfied with the performance of the organisation and its operational funding is expected to be continued at least in the short to medium term.   As mentioned, since data collection the organisation's membership (and consequently funding base) has grown to incorporate another local government.

The case also involved a basic document analysis, involving a mix of member organisation annual reports and corporate plans, website publications and the organisation's strategic plan. The document analysis added depth to the data collected and a different perspective to that provided by interviewees.

Detailed results

Organisational elements

<u>Leadership</u>

While no clear leader was identified in the interviews in terms of strategy processes, leadership is present in this case in relation to regional economic development. Most significantly, four Directors of the [*Regional Organisation*] are Mayors of the four member local governments, meaning they are leaders representing their communities and able to bring issues to the regional table, and communicate regional issues back to local communities. The interviews and document analysis did not identify any other economic development bodies in the region that might compete with the organisation for leadership of regional economic development.   While it is concluded that regional leadership is

present, and despite identification of 'Taking the lead' as the organisational vision, a review of selected member publications found that these organisations did not actively promote it as the regional leader in respect to economic development. While leadership was identified by some interviewees, who suggested that Board members will step forward and lead the [*Regional Organisation*] on issues that are of interest to them and that there is a mix of the General Manager/Executive Officer and the Board taking the lead, there did not appear to be an individual encouraging, driving or maintaining strategic planning processes.

Shared understanding of purpose and goals

Interviewees identified different, but consistent purposes for the organisation. While these are broad in range, there seems to be a shared understanding of the high level purpose – economic development, coordination across the region, and population and economic growth. The goals of the organisation were not identified by interviewees and the document analysis identified goals in the strategic plan that were general and not directly related to outcomes to be achieved. Therefore this element is present in part – there is a shared understanding of the high level purpose of the organisation but not of any specific goals.

Member to member relationships

Relationships with the [*Regional Organisation*] Board were identified by all interviewees as excellent. Members reported feeling trust and respect, and an understanding of the specific skills of other Board members was shown by some interviewees. There appeared to be a good awareness of the interests of each member and a sense that members were involved for similar reasons. As an element, good member to member relationships was present.

Roles and responsibilities

Clarity of roles and responsibilities as an element was not present. A couple of interviewees stated that there was a lack of clarity regarding whether CEOs of Councils were directors of the organisation. These interviewees gave the impression that the issue has been recognised at Board level and is likely to be addressed. One interviewee suggested that the role of the General Manager/Executive Officer could be enhanced so that it also, received Director status (and therefore voting rights) and could take more of a lead on the strategic approach of the organisation. Interviewees agreed that there was some potential for confusion with the Regional Organisation of Councils given that meetings are run back to back and involve the same people.

In terms of the role of the [*Regional Organisation*] most statements served to expand it rather than narrow it down to a specific focus. According to the interviews, the organisation seeks funding, organises training, does marketing, skills development, facilitates, coordinates, brokers, communicates, mediates, and advocates. The strategic plan adds: project development, project management and delivery, project coordination, submission writing, research, review and analysis, information and statistics, secretariat services, networking, and regional coordination.

Involvement of implementers in strategy formulation

Most interviewees felt that [*Regional Organisation*] staff were generally responsible for implementation (through the General Manager/Executive Officer), although they recognised that other organisations were often involved in projects, particularly when relating to a specific local government area. The strategic plan allocates implementation

responsibility to [*Regional Organisation*] staff and does not identify opportunities for other organisations to contribute. An interviewee identified that staff were involved in the development of the current strategic plan. Given this mix of responses, this element is thought to be partially present.

Strategy processes

Knowledge generation and sharing

Knowledge generation and sharing is present only as a part of progressing particular issues and projects. Interviews suggested that knowledge generation is generally issues-based. Board members might have an interest in an issue and undertake research to bring to meetings. Alternately, the Board might request some research be undertaken to understand an issue or assist a decision. One interviewee stated that speakers are occasionally brought into meetings to give more information on a topic. Information also comes into the organisation through community member contact with the Board, particularly relevant given Board members are the Mayors of the local communities and have a high profile.

Analysis

As an element, analysis is present however related more to specific issues and projects than overall economic or organisational analysis. The interviews did not identify any specific processes for analysis. Generally it appeared to occur through issue-based research and discussion at Board meetings where all members shared their thoughts on the issue. One interviewee reported that analysis in not based on the economy or the strategic plan and that it is project specific.

Options evaluation

Options evaluation is present as a consistent process, but without a link to the strategic plan. Generally there is no conflict on decisions, although one interviewee stated that some initiatives are adopted for only one or two Council areas and not all members are comfortable with that. The process usually followed for options evaluation involves an issue and any research being tabled at Board meetings (or sent to the Board by email), followed by discussion that considers the regional impact and then a consensus decision on any action to be taken. Other factors identified in the interviews that bear on options evaluation are funding and personal experience. It was suggested that a lot of the issues considered are forced by external happenings. One interviewee felt that it would be hard to go outside the vision and pick a project that wouldn't benefit the region. While the decision does not follow the strategic plan or an explicit set of priorities or involve a choice between a number of major options, it does involve some comparison of alternate actions.

Emergent strategy

Interviewees had different opinions about how much planned strategy is used with responses ranging from planned strategy being dominant to a fifty/fifty split, to emergent strategy being dominant. Interviewees suggested that there are a lot of opportunistic projects (or projects that come from current issues), and one interviewee clarified to state that the approach is proactive rather than reactive. The document analysis compared the strategic plan with projects mentioned by interviewees. This comparison suggests that the approach is heavily emergent and not necessarily strategic – most projects could not be easily linked to initiatives or strategies in the strategic plan. As an element, recognition of emergent strategy in strategic documents is not present.

Review of strategic plan

This element is not present. No interviewee was able to identify a review of the strategic plan that had happened and some acknowledged that a review was due. An interviewee suggested that the annual report could act as a prompt for the review of the plan. The recognition of the need for review and the intention to schedule a review was noted from interviewee comments.

<u>Monitoring of progress</u>

Interviewees stated that current projects and finances are reviewed at every meeting. One interviewee suggested that funded projects in particular are reviewed. An annual report is prepared every year which identifies progress made on initiatives, but not specifically on the strategic plan. Monitoring of progress therefore is present but only in relation to individual projects.

<u>Constant reference to strategy</u>

This element is partially present. Most interviewees stated that they have only opened the strategic plan once. One interviewee suggested that they open it when there's something they want to do and the General Manager/Executive Officer indicated that he opened it weekly.

Strategy outputs

<u>Vision</u>

There is an organisational rather than regional vision. This is recorded in the strategic plan as 'Taking the lead'. One interviewee suggested that everything comes back to population growth or preventing decline. Another interviewee stated that while there is no regional vision, the organisation is not rudderless. One interviewee expressed the concern that there doesn't seem to be any consideration of what will make the region survive in the long term. The element of a regional vision is absent.

<u>Long term plan</u>

Interviewees had different views on whether there were long term goals. Some thought there were explicit goals, one stated that everyone probably had the same long term goal and others suggested that there were no long term goals. Goals were identified as incremental and one interviewee felt that quantifiable goals were undesirable as they could potentially trap the organisation. The strategic plan covers a short timeframe (2004-2006) and its goals relate more to the general area of operation of the organisation rather than long term outcomes. Without long term goals, there is an absence of a long term plan.

<u>Formal document</u>

The strategic plan is a formal document, so this element is present. An interviewee suggested that it was important to have for itself and for the process of developing it. Most Board members interviewed stated that they had a copy (one wasn't sure).

<u>Priorities</u>

Interviewees generally agreed that there were no ordered priorities (one stated that they shouldn't be ordered). It was felt that the Board sets the direction and this direction was generally obvious, based on the experience of Board members. Also, an interviewee stated that the direction varied to suit the organisation's needs at the time. The potential for this to lead to a delay in project progress was recognised by a couple of interviewees.

<u>Performance measurement</u>

Interviewees suggested that performance is measured on an ongoing basis and that it is possible to tell straight away whether something is successful, although it's hard to tell about the longer term impact. Community feedback was identified as a way of measuring success, as was the General Manager/Executive Officer's performance appraisal and progress against financial outcomes. A few interviewees referred to the list of projects, costs and benefits at shire level produced by the organisation to demonstrate outcomes achieved. While generally no specific measures are used, an interviewee stated that more formal measures are present in relation to funded projects. While measures are partially present in relation to specific projects, an overall pre-determined performance measurement framework is absent.

Implementation plan

Interviewees tended to agree that implementation responsibility sat with the General Manager/Executive Officer in most cases. There was also reference to plans for individual projects, particularly funded ones. The strategic plan allocated implementation responsibility to either the General Manager/Executive Officer or staff members. A formal implementation plan that relates to the activities of the organisation does not appear to be present.

Communication of strategy

One interviewee suggested that the general community is probably not aware of the organisation's strategy and another thought it was well-known for what it does. Positive approaches for communicating were identified as shared media with other organisations and presentations that the General Manager/Executive Officer does to councils. A review of the website found that it lists the vision, mission and goals of the organisation, but there was an absence of information about the organisation in member publications. Communication of the organisation's strategy in terms of strategic plan or direction is only partially present.

Completed projects, projects in progress

Interviewees listed a range of projects, some that had been completed and a number still underway. One interviewee expressed frustration with the fact that funding for projects was often stopped just when the project was starting to take off. Often, interviewees identified the same few regional projects and one or two relating to specific local government areas. The document analysis found that these projects are generally not listed in the strategic plan or members' corporate plans.

Characteristics of elements

Realism

Interviewees identified a need for realism in terms of planning by suggesting that there is an inability to see what might happen in the future and this means it is difficult to order priorities. Another stated that realistically, their Council would always come first and the [*Regional Organisation*] second. Another interviewee thought more realism was needed, suggesting there was currently a lack of understanding the economic element. On this basis, it appears as though realism is only partially present.

Relevance

Different aspects of relevance came out of the interviews, ranging from the idea that the strategic plan was only relevant to a new member until they attended Board meetings, to the suggestion that only relevant projects made it to Board meetings due to the sifting processes they went through to be brought to the attention of directors, to the perception

that not all projects were relevant to all members. Other thoughts were that strategies actually did relate to what is being done, that plans and activities needed to be directly relevant to local government and that it was important to have a greater consistency between the strategic plan and what went on in meetings. The strategic plan does not appear to be relevant to the day to day activities of the organisation.

<u>Clarity</u>

One interviewee said – keep it simple, don't confuse it, while another suggested that performance measures were needed for the 'fuzzier' projects. The diversity of statements made in relation to the purpose and role of the organisation suggest that clarity is lacking in these areas also.

<u>Creativity</u>

Some interviewees thought creativity was present, through brainstorming, finding different ways to handle a situation, and challenging discussions (and that Board members cooperated very well when doing this). One stated that they try to be creative, but sometimes there really only is one option. Others thought there wasn't enough brainstorming and that planning is seen as boring. Generally, it appears as though creativity is partially present.

<u>Consistency</u>

Interviewees didn't think there were any issues with conflicting decisions, although the potential for parochial decisions was recognised. The lack of conflict was thought to be due to the close working relationships and the involvement of Mayors in the [*Regional Organisation*], as this helped to decrease the chances of inconsistent decision making occurring in member organisations. One area where an interviewee identified consistency in decision making was the agreed approach to not take on funded positions unless there was a spin off benefit for the [*Regional Organisation*]. An interviewee also suggested that all projects could be traced back to population and people – growing or at least maintaining the current population. Consistency is present across different aspects of the organisation.

<u>Complementarity</u>

An interviewee thought that membership in the organisation complements the objectives of the individuals involved. Another suggested that sharing information leads to better outcomes, which in this case might be the potential for complementary decisions. Also, opportunities arise to attach a complementary activity to one already being undertaken, such as using the jobs expo to promote the region as a development destination. Complementarity seems to be present, although the lack of specific reference to [*Regional Organisation*] projects in member publications could indicate that this presence is fairly limited.

Challenges for the organisation and strategic planning

A wide range of challenges were identified in interviews. These were related to the external environment, member base, priorities, measures and activities, and others. Interviewees felt that the dynamic nature of the external environment made it difficult to operate and to forecast future scenarios and plan for them. Some projects were impacted by the environment, for example a desired project might be investment attraction, but an infrastructure shortage caused by the intensive mining development might need to be addressed first.

The membership base presented a number of challenges. First of all, the personalities of some individuals could occasionally be difficult to work with. Sometimes expectations with respect to the role of the organisation were hard to meet or different. Also, members sometimes brought forward projects that should stay with their own organisations and at other times not all members wanted to get involved in an initiative. In fact, one interviewee suggested that some regional projects may have a negative impact on one shire or uneven benefits for members, making it difficult to decide to move forward. In other cases, the regional aspect is not always understood, especially when projects are outside the area perceived as the region. An interviewee also thought the different sizes of the council areas sometimes presented a challenge.

The organisation culture was thought to limit things like brainstorming, the absence of requests for the plan was challenging and the 12 month view of members was an issue too. One member stated that sometimes it was challenging being faced with questions about the [*Regional Organisation*] in their own organisation. The restricted membership also meant there was a focus on issues impacting on local government. One member also recognised that their ultimate priority was their own organisation.

The dynamic nature of current issues was perceived as a challenge to one interviewee, and another was concerned about the fact that the organisation's success was measured in relation to how well it dealt with current issues. Also perceived was: a need to juggle stakeholders driving priorities; the fact that ratepayers were not interested in the long term; and the difficulty in coming up with measures for some projects. Other challenges identified were: funding; time; community reluctance to try something new; finding a balance with respect to planning; and justification of decisions.

Positive feedback

Some of the things highlighted by interviewees as positive aspects were: trust; commitment; the way the councils worked together; and the fact that the councils involved were fairly small meant relationships were less complex than they would be with larger councils. Interviewees also felt that the small communities meant that it was easier to get information because members often ran into people and got a chance to discuss issues with them. The transferability of initiatives across shires was thought to be a positive aspect, as well as openness between members even though it may cost them.

Changes suggested by interviewees

Interviewees suggested that while relationships were effective at the current time, the future may be different and perhaps more structure could help with this. The strategic plan could be aligned with weekly, monthly, quarterly decisions and it would be good to package everything in one document. One interviewee suggested that greater clarification was needed on the difference between the [*Regional Organisation*] and the ROC and another suggested that clarification was needed regarding what members actually want out of the organisation. This was supported by other interviewees' comments. One suggested the direction could be clearer and another suggested a ten year goal was required. One interviewee thought the General Manager/Executive Officer could take more of a lead in terms of the strategic direction of the organisation but that in accordance with this expectation, he should be given voting status as a director. In general, suggestions came across as additional considerations rather than criticisms of the organisations – interviewees were very positive.

Appendices

Appendix 1 – Interpreting the theoretical framework

Strategy Element	Description	Interpretation
Organisational		
Leadership	regional leadership on economic development	Are community leaders involved? Do people see the organisation as a leader? Are there other regional economic development bodies?
	leadership on strategic planning	Is someone driving strategy processes on an ongoing basis?
Purpose	shared understanding of general purpose of organisation	Do people seem to have the same impression of the general purpose? Are similar words or concepts used to describe it? Are the same words used in documents?
	shared understanding of specific goals of organisation	Can interviewees give the same details about why the organisation exists and what outcomes it ultimately wants to achieve? Are these specific or general? Are these reflected in any documents?
Member to member relationships	a strong relationship between members, including awareness of each other	Do most interviewees refer positively to other members? Are relationships thought to be good? Is there a sense of trust?
Roles and responsibilities	clarity of roles and responsibilities within and for the organisation	Is there a shared sense of the actual role of the organisation, including what may be within it and outside it? Do the roles and responsibilities of individuals within the organisation seem to be well understood?
Implementer involvement	involvement of implementers in strategy formulation	Who is involved in implementing decisions? Did they have input into the formulation of the strategic plan?
Process		
Knowledge	knowledge generation and sharing in relation to specific projects	Is knowledge sought in relation to specific projects? Is knowledge shared within the organisation in relation to specific projects?

	general knowledge generation and sharing	Is knowledge sought in relation to the overall economy, performance of the organisation, and competitors? Is theory or expert advice sought? Is this knowledge shared within or outside the organisation?
Analysis	project or issue focused analysis	Is knowledge applied and considered in relation to specific projects or issues? Are any tools used to aid analysis in relation to projects or issues?
	analysis based on economic drivers, including competition	Is knowledge based on economic drivers, competition, theory, external advice and the performance of the organisation applied and considered in relation to the overall strategic direction of the organisation and its activities? Are any tools used to aid analysis? For example, considering possible scenarios of different actions and the outcomes that each might have. Considering possible future scenarios and how they might impact on the organisation. Comparing the organisation to other organisations. Considering outside organisations and their motivations and possible actions.
Options evaluation	options evaluated in relation to strategic plan	Are different options considered before making a decision? Are these options evaluated in relation to how they contribute to achievement of the overall strategic plan or the organisation's long term goals?
Emergent strategy	emergent approach	Are there consistent decisions made that are aimed at achieving specific organisational goals? Are there actions, plans or projects that are agreed in response to analysis or changes in the internal or external environment or projects that are not specified in a strategic plan?
	recognition of emergent projects in strategic plan	Are these projects included in the strategic plan after being taken on?
Monitoring of progress	project specific monitoring of progress	Is the progress of specific projects or initiatives monitored in any way?
	monitoring of progress in relation to strategic plan	Is the progress of the organisation against its strategic plan monitored in any way?
Review	review of strategic plan/direction	Is there a regular review of the strategic plan or direction of the organisation? Is there ever a review?
Reference to strategy	constant reference to strategy	Is the strategic plan regularly referred to by members and staff? Is it referred to at all?
Outputs		
Vision	a meaningful, clear, shared vision for the organisation	Is there an agreed future that is perceived as the aim of organisational efforts? Is this incorporated into a vision statement? Is it visual/able to be imagined from the description? Is there a shared awareness of this vision?

Long term plan	a specific, agreed long term plan or goals	Are there any intended actions over a time horizon of greater than 5 years into the future? Does this include desired outcomes of the actions in some form? Is there a shared awareness of this plan?
Formal document	a formal document that outlines the long term plan and strategy	Is the organisation's strategy and planning published in a formal document? Who has a copy of the document?
Priorities	ordered priorities	Are key strategic areas indicated by ordered priorities? Is this used as a guide for activities and new projects?
Performance measures	project specific performance measures	Performance measures involve determining how the organisation will tell if something has been successful. Are specific measures agreed before a project of initiative is started?
	overall performance measurement framework	Is there an overall set of measures tied to the long term plan and linking to projects and activities, determined in advance to indicate whether an organisation is successful?
Implementation plan	implementation plan	Is there a single implementation plan that records decisions about what activities must be undertaken to achieve the long term plan, who is responsible, what priority the activity is, when it is to start and finish and how success will be measured?
Communication of strategy	communication of strategy	Is the organisation's strategy and long term goals communicated to the membership base and general community? How often and how?
Characteristics		
Realism		Does the plan take account of challenges in the context? Are goals thought to be realistic given available resources?
Relevance		Is the plan relevant to the activities of the organisation? Are the activities relevant to members? Are processes relevant?
Creativity		Is the status quo ever challenged? Are different ways of approaching an issue considered? Are different options put forward? Is there debate over options? Are tools such as brainstorming or scenarios used?
Clarity		Are strategies, statements, measures, goals, etc specific enough that there is only one possible interpretation?
Consistency		Are activities consistent with the strategic plan or each other? Are processes used consistently? Are measures applied consistently?

Complementarity	Are there activities or projects initiated outside the organisation that complement those of the organisation, particularly in terms of achieving long term goals? Is there awareness of interrelationship of activities and potential synergies?

Case Report

Case 2

Overview

Purpose of this report

This report has been prepared for General Manager/Executive Officer, [*Regional Organisation*] for the following purposes:

- to share raw findings of the research to date

- to provide a basis for further discussion, particularly on any elements that need reconsidering

- to identify gaps in the document analysis

As with all stages of the research project, participation in a review of this report is optional, and a lack of response will be interpreted as no further comment necessary.

Publication of results

This report has been produced specifically for the above purpose. Any information from this report to be used in my thesis or other publications of results will not use the name of the organisation or refer to any individuals in the region by name.

Requested action

It would be greatly appreciated if [*Name*] could read this report and contact me either by email or phone to suggest any amendments to the report, including any elements that need to be reclassified in terms of being present or absent. While the suggested reclassification may not be adopted in every situation, feedback from [*Name*] will be given full consideration. If there are any gaps or corrections related to a key document being missing from the document analysis, it would be appreciated if a copy of that document could be provided. All documents not publicly accessible (eg. available on the internet) are treated as confidential and stored in a secure location.

Further reports

The thesis will involve analysis of the results and conclusions and recommendations across all three cases. A general and brief summary of results will be provided to all interviewees.

Case results

Background

[*Regional Organisation*] at the time of undertaking the case study, was concerned with an area incorporating four local government areas. The [*Regional Organisation*] region is an

industrial and rural area, with a specialisation in manufacturing, agriculture and mining (OESR) and is currently benefiting from increased industrial activity both on the coast and inland. The region is 26,243km^2 with an estimated resident population of 64,092 (2004p OESR). In the year ended June 2005, building approvals totalled $149.5m and residents had a mean taxable income of $42,044 (2002-03), which is above the Queensland total. The region has a combination of urban and rural areas, with a large proportion of the population in a small area on the coast and the rest spread across the region.

[*Regional Organisation*] was established in 1981 for the purposes of promoting [*City*] as more than just an industrial centre. Membership is heavily based around [*City*] as a result, however, it has begun to expand into the Hinterland with the involvement of [*Name*] Council in 2004. The organisation has a broad membership including four local government authorities, major industry, Boards/authorities, small/medium enterprises (including tourist operators) and individuals. Besides membership funding, it receives local government, state government and corporate funding for its general operations and a mix of local, state, federal and private sector funds for specific projects. The organisation runs an office and three Visitor Information Centres. Its activities are overseen by a Board of Directors of sixteen, including elected Directors and appointed Directors (representative of different segments of the membership base). The [*Regional Organisation*] operates through six units: economic development; tourism marketing; visitor services; events development; community services; and corporate services.

The preparation of this case involved six interviews comprising a mix of staff members, Board Directors, members of the Development Committee and local organisations. Interviewees had been involved with the organisation for periods ranging from 20 months to more than six years. The impression from interviews is that members are generally supportive of the organisation and expected a continuation of its funding and operations.

The preparation of the case study also involved a basic document analysis involving annual reports and corporate plans from member organisations, regional publications and web pages. A regional strategic plan developed in 1997 was also considered.

Detailed results

Organisational Elements

Leadership

Leadership in terms of the organisation filling the role as the regional leader in economic development was found to be partially present. This relates to the involvement of some (but not all) community leaders and the positive working relationship with one of the few other economic development organisations operating within the region. According to interviewees, leadership was present in that interviewees felt formal leadership roles such as General Manager/Executive Officer, Board and Chairperson were undertaken effectively. The organisation's annual report suggests that leadership comes particularly from the General Manager/Executive Officer. Interviewees did not identify leadership in relation to initiating, driving and maintaining strategic planning activities.

Shared understanding of purpose and goals

There seemed to be a good awareness of the original purpose of the organisation and a general view that this had changed slightly over time. The [*Regional Organisation*]'s most recent annual report suggested that its current purpose is to promote and partner growth in the region. This was supported by interviewees who referred to promotion and

development as the purpose. However, while this high level understanding appears to be present, the interviews revealed that members had very different philosophical viewpoints on how economic development should be approached (and this was not acknowledged by any interviewee). One perspective put forward in interviews was that the organisation followed a bottom-up approach, responded entirely to stakeholder needs and undertook community capacity building and related enterprise facilitation. An opposing view was that the organisation was focused on growing the economy through development and increased employment opportunities and that this was done through an understanding of economic drivers and bringing about change in relation to them. The lack of a shared understanding was identified by one interviewee who stated that there wasn't even agreement on the Board as to what development is.

Organisational goals were recorded in a strategic plan developed in 1997, although interviewees either didn't acknowledge this document or stated that it was no longer relevant. The goal of making [*City*] a great place to live, invest and visit was raised in one interview and was printed on the back cover of some publications, but this didn't appear to be a shared view across the interviews.

Member to member relationships

Member to member relationships were identified in the interviews as generally good. Members seemed to be aware of each other and little negativity or conflict was identified. The diversity of the Board and the membership base was thought to be a positive by a couple of interviewees. There were differing opinions regarding the presence of hidden agendas on the Board, and one interviewee suggested that there was a need to play politics to work around some people.

Roles and responsibilities

Internally, roles and responsibilities seemed to be well-understood, however, the overall role of the organisation was not clear. One interviewee suggested that a particular group of members sometimes approached the organisation to take on projects that were outside its role. Other comments about the role included to research, gauge, facilitate, coordinate, leverage off things, engage, promote, refer, discuss and provide information. The [*Regional Organisation*]'s 2003/04 and 2004/05 annual reports suggest roles such as facilitation, provision of information, regional tourism marketing, coordination of events, and assisting community organisations.

A few interviewees talked about the importance of not duplicating the work of other organisations and this suggested that there is a general understanding of what is within the [*Regional Organisation*]'s role and what is not. However, another interviewee suggested that some of the projects undertaken by the organisation were more appropriately located within the role of the [*State Government Department*]. One interviewee thought the role of the development committee was not clear and this was leading to unnecessary and time consuming processes.

Involvement of implementers in strategy formulation

Not all interviewees were involved in strategy formulation and there was little reference back to any formal strategy in discussions about the organisation, its role and current and future activities. One interviewee suggested that the community could have been more involved in developing the strategy. Staff were involved in specific project planning, rather than overall strategic planning, and indicated an intention to undertake internal planning in the future.

Strategy processes

Knowledge generation and sharing

Knowledge generation takes places through research, although interviewees suggested that this research is issue or project based and can be anecdotal. Most references by interviewees to research related to internal sources and consideration of issues – there was no mention of external sources, experts, comparisons or broader theory, except for a brief reference to statistics. Sharing of information was identified as occurring regularly through formal and informal mechanisms such as member newsletters, meetings and responses to requests for information. While openness across organisations within the region was identified by one interviewee as good, there was a suggestion that staff are sometimes unaware of what's going on and that some things had to stay hidden. Commercial confidentiality requirements were acknowledged and one interviewee suggested that the Board was generally aware of what's going on before the public.

Analysis

Analysis is undertaken on a project or issue-specific basis by staff, members or committees. According to one interviewee, often the first stage of analysis was to determine whether there actually was an issue that needed resolution. This involved discussions with the community and then more formal discussion at committee or advisory group level. Another interviewee thought analysis was too shallow, indicating that it didn't go past face value to consider economic drivers. This case displays project or issue focused analysis but no evidence of analysis based on economic drivers or competition.

Options evaluation

The large size of the Board was thought to make it difficult to move through an evaluation process to a decision, however, interviewees generally felt that the approach used by the chair as well as other processes made it possible to make decisions. An interviewee suggested evaluation was done similarly each time, and another suggested that a survey and forum approach were regularly used to evaluate options with stakeholder groups. Options evaluation was thought to be based on the following factors: consideration of the long term interests of the agency and the region; evaluation against the three priority areas of the committee (which an interviewee agreed were very broad); and comparison against other options. There was no mention of reference to a strategic plan when evaluating options.

Emergent strategy

There were some differing opinions regarding the proportion of planned to emergent strategy. While one interviewee suggested that planned strategy was dominant (stating that the Board didn't run around putting out spotfires), most interviewees thought that the organisation used a majority of emergent strategy. One interviewee labelled the organisation as reactive and suggested that all projects were generated outside the organisation. Another indicated that the starting point for a new initiative was awareness of need. There was a sense that opportunities arose on a daily basis and the organisation needed to be flexible and responsive to cope with this. A review of projects found that it was difficult to link projects to specific goals, meaning a strategic approach may be absent.

The interviews did not identify any processes to update planning documents to reflect emergent strategy. While an emergent approach is present, emergent strategy is limited and recognition of emergent strategy in strategic documents is absent.

Review of strategic plan

An overarching strategy review does not occur. Interviewees stated that the strategy developed in 1997 was not relevant and dismissed it. An annual operational plan was identified and one interviewee suggested that it is rewritten every year. However, another interviewee suggested that it is currently out of date. The organisation does not undertake an in-depth review of projects or whether to be involved in them according to one interviewee. One interviewee reported confidence with processes to ensure everything is ok, while another suggested that the Board had a role in reviewing the organisation, and thought this wasn't done often enough. This element is not present in this case.

Monitoring of progress

Tracking of progress as an element is present in relation to specific projects. Interviewees stated that the progress of current projects is tracked through committee meetings. Reporting on progress is provided to members through various meetings, inclusion in member newsletters and the annual report. Tracking of progress in relation to a strategic plan is not present.

Constant reference to strategy

This element is not present in this case. Interviewees stated that they either don't have a copy of an organisational strategic plan or they don't really open it.

Strategy outputs

Vision

No clear regional vision was identified through interviews. One interviewee thought it was about growth, one suggested that a vision wasn't necessary and another said there was an agreed direction, but didn't indicate what it was. This interviewee also shared the view that the organisation's goalposts needed to be flexible, supporting the perception that if there was a vision it must quite broad.

Long term plan

There was a lack of a current long term plan or explicit long term goals. Apart from the 1997 document dismissed by interviewees, no long term plan was identified. Interviewees suggested that the organisation was reactive not strategic, and worked towards short term goals, but that the nature of results was long term. One interviewee interpreted the setting of long term goals as a top down approach and suggested that a community centred approach was more relevant. Another interviewee stated that everything was short term and undertaken to satisfy the squeakiest wheels. An interviewee suggested that the organisation had lacked direction in the past and that this led to problems.

Formal document

There are a number of formal documents – the 1997 plan, an operational plan and a marketing plan. Not all interviewees were aware of these documents.

Priorities

Ordered priorities as an element were absent from this case. Staff allocated their effort according to what the committee or Board saw as important. This appears to be based on community pressure or interest, or in the case of funded projects, the goalposts attached to the funding. An interviewee said that priorities can also shift depending on the course of a project or pressure being felt in relation to it. Interviewees stated that previous difficulty with a staff member trying to deliver between 20 and 30 projects at once led to the

development committee identifying three priority areas. One interviewee agreed that these areas are still quite broad and could easily cover 30 projects.

Performance Measurement

Apart from where required in funding submissions, there is no deliberate attempt to identify how the success of an individual project will be measured prior to commencing the project. Interviewees suggested that some things were difficult to measure, that a key measure is the general sense afterwards, and that the biggest measure is whether the community is still saying it's an issue. In terms of the overall performance of the organisation, community and general membership satisfaction and value for money were identified as measures. The Key Performance Indicators set by the [*State Government Department*] are measures attached to funding, and were perceived as externally set measures over which the organisation has no control. An interviewee suggested that these measures are not felt to have meaning to the organisation, which might explain why funding expectations were perceived by one interviewee as not being met. While there were no service level agreements in place with members, an interviewee suggested that they were important to separate expectation from reality.

Interviewees were polarised on the applicability of long term performance measures. Some interviewees suggested the measures should be based on changing drivers or making a difference. However, some felt that there was a difference between small and large members - the larger members could see these longer term goals but the small members wanted tangible outcomes. One interviewee stated that these tangible outcomes (or run-scoring opportunities) were desirable and another expanded by stating that sixty to seventy percent of outcomes should be delivered in the first twelve months, with the rest in three to five years.

There was also a perception that short term funding and work, and long term results don't correlate and that the organisation couldn't worry about longer term outcomes with respect to things outside its control. However, another interviewee stated that the Board was not about physical outcomes, it was strategic and visionary.

A review of the organisation's annual report suggests that overall performance reporting was not related to any particular strategic plan and qualitative in nature. This is consistent with the perspective of an interviewee who felt that qualitative measures were more relevant to the community and quantitative ones were more appropriate for funding and funded projects. Overall, performance measurement as an element is partially present as is performance measurement in relation to specific projects.

Implementation plan

The element of an implementation plan is partially present. While not specifically tied to a strategic plan, the organisation has an annual operational plan and budget. One interviewee expressed disappointment that there didn't seem to be a formal strategy aimed at influencing other groups to assist in implementation.

There is a perception with some interviewees that there is a lack of project planning. When interviewed, staff showed an awareness of the need to plan a project down to a to do list. The interviews revealed a sense that project planning is easier (more black and white) when the project requires development of a funding application.

Communication of strategy

Communication appears to be related more to current issues and projects than the strategic direction of the organisation. Interviewees felt that there was some confusion as

to the role of the organisation at a grassroots level, that the organisation claimed a greater involvement in projects than was the case and that a lot of people in the community weren't able to see the big picture.

An interviewee suggested it is important to engage the community, not in what the organisation is trying to do but what the best strategy is. The organisation regularly releases information through the media, members' newsletter and its annual report and one interviewee suggested that the current practice of organisation staff attending meetings of member organisations assisted in building awareness.

Analysis of member publications such as local government annual reports and corporate plans showed only one organisation clearly referred to the [*Regional Organisation*] and this was in relation to its role rather than strategies. Communication of the organisation's strategy is not present, despite the strong communication effort.

Completed projects, projects in progress

Interviews and the document analysis identified a number of projects the organisation has been involved in. The role of the organisation appears to vary across these projects however, ranging from sitting on a committee to offering consultancy services. The projects covered different areas in the region (some relating specifically to individual local government areas), related to a mix of tourism, community development, economic development and other. In a number of projects, the organisation did not have lead responsibility for implementation. Some projects clearly related to strategies in the 1997 strategic plan and others did not.

Characteristics

Realism

Realism within the organisation was challenged by some interviewees. One suggested that there is no understanding of the key drivers for development and that there is an unrealistic number of projects on the table. Another interviewee suggested it would be advantageous to undertake a smaller number of projects to achieve a higher completion rate. Realism is also thought to be required in relation to how much time is given to projects and the expectations of members regarding what the organisation is asked to do compared to what it is capable of doing.

Other comments include that it is important to match staff capabilities to the job, there is a requirement to balance different needs, passions and performance indicators, that the organisation can't be too rigid in it's role and that the budget limits what can be done. Realism appears to be partially present.

Relevance

The importance of relevance was summarised by one interviewee who stated that people need to feel some ownership of the strategy or it won't get used. Another suggested that the 1997 strategic plan was irrelevant and yet another thought that information in published documents becomes dated very quickly. This was supported by a view that the organisation often needed to adapt to more pressing issues.

There was recognition that different communities had different interests and one interviewee thought the organisation name was not relevant for the overall region. Relevance also came up in terms of involving stakeholders in initiatives – sometimes a lack of positive response was thought to be due to the wrong stakeholders being involved or duplication occurring. Relevance was not present in terms of the strategic plan.

<u>Clarity</u>

As an element, clarity is not present in this case. The interviews revealed that there were different views as to what development is, and while defining three areas of focus for the development committee helped, an interviewee admitted that they were still quite broad. The need for clarity was recognised by interviewees, and one suggested that in terms of working together, it helped to find common ground. The document analysis identified some clarity but not on key aspects such as the role of the organisation and its strategies or particularly how it works with other organisations in the region.

<u>Creativity</u>

Creativity is partially present in this case. Some interviewees thought it was present and others suggested that the usual approaches were used. One comment was that creative solutions were generated but were then watered down through constraints being imposed on implementation. A couple of interviewees felt that the diversity of the membership base and the Board encouraged creativity and that this occurred through participants listening to others' views and amalgamating them. One interviewee suggested that it was important to have different ways of capturing different people's opinions.

<u>Consistency</u>

An interviewee reported that different organisations in the region were all singing from the same song sheet as a result of maturing relationships between them. Interviewees showed awareness of the need for consistency - one suggested that a scattergun approach would mean that results would take longer to achieve and another suggested that strategies needed to be consistent with the aspirations of the Board. Inconsistencies related to interviewee thoughts that not all projects undertaken by the development team were development related and that there was no evaluation of potential projects in terms of a vision for the region. Consistency appears to be partially present.

<u>Complementarity</u>

Complementarity was only identified in terms of some co-badging of promotional materials within the region. Interviewees suggested that a lack of awareness of the organisation's strategies limited complementarity, and identified an idea that other organisations don't want to wait for the [*Regional Organisation*] to get around to doing something. An interviewee also stated that some people couldn't see the big picture and another said that not everyone realised they are making a contribution to economic development. This element is only partially present.

Challenges

A large number of challenges were identified by interviewees in relation to the external environment, funding, priorities and activities of the organisation, membership and others. In terms of the external environment, it was felt that the community had a great impact on the organisation and was becoming more demanding. Interviewees also referred generally to impacts felt from the environment, a maturing economy and the fact that some things couldn't be controlled. A particular comment was that things imposed from the outside onto the region would not work, but that this was often done by government.

Funding also presented a number of challenges to the organisation. Interviews thought it was pivotal to the operation of the organisation, that a lack of funding leads to blockages in projects, that budget limits everything, that there was a lack of funding to do everything the organisation wanted to do, and that a great deal of pressure was caused by funding because without it, the staff would not have a job. The delay in funding applications, the

competitive marketplace for funding and the short term nature of funding were also identified. An interviewee also thought the expectations of funding bodies posed a challenge.

Funding also tied in with the next area of challenges, priorities and activities of the organisation. There was a perception that funding bodies put up measures that relate to things not controlled by the regional organisation. An interviewee thought there were often long term results after a short term effort, but another suggested that the organisation's delivery mechanism couldn't perform on long term issues. Perhaps this was related to the perception that there was not enough time spent discussing strategic issues, or the concern put forward by two interviewees that there were too many projects with the current resourcing to be able to deliver desired outcomes. The idea that stakeholders wanted to see tangible outcomes was raised, and the concern that not everything is tangible. This is related to the comment that it was hard to predict outcomes up front and perhaps also the idea that some projects are more difficult than others and nobody wants to take them on. Some interviewees expressed a reluctance to commit to one approach because of the expected loss of flexibility and resulting narrow thinking this leads to, but another suggested that it was too easy to be dragged off on a tangent. Yet another thought that there would always be hidden issues and priorities. Another challenge related to work with community organisations – that it was hard to limit the time spent on one organisation and that there was a fine line between helping them and doing everything for them.

Challenges related to the membership base involved concerns with the size of the Board and the difficulty this led to in moving forward on issues. Another issue with the Board was the voluntary nature of members, the fact that they were all busy and that each had a different skill set. Further, local government members all represented shires of different sizes and contributed different amounts yet the organisation needed to be fair and equitable to all.

Interviewees raised parochialism and it's influence on hidden agendas. One interviewee suggested that everything was done to satisfy the squeakiest wheels. Others expressed requirements for: parochialism to be left behind; the group to see the regional picture; and members to be open-minded to the views of others. One interviewee stated that sometimes people do not get involved with implementation when they need to, if they feel their views haven't been heard when strategies are being developed. Other comments were: that there were differences across the membership base in that not all members thought strategic planning was important; that some couldn't see the big picture; that there were too many members to satisfy; and that it was difficult to capture everybody's thoughts and aspirations.

Other challenges identified were that the structure or the capability of the organisation did not assist it to be effective strategically and that there was a lack of direction. The time involved in strategic planning was also identified as a challenge as was the number of different plans in the region. The organisation itself was thought to be in a difficult position in that if it didn't deliver, it would be 'shot', and another interviewee thought it was not desirable to become too passionate on issues. On the other end of the scale, interviewees suggested that sometimes there was a challenge with community openness to new approaches, that a lot of organisations put up barriers, or that groups often saw things from different perspectives. Sometimes people don't realise they're involved with economic development and in some cases, people go cold on an idea or don't get around to it which affects implementation.

Positive feedback

Interviewees made a number of positive comments about the organisation. The community-driven nature of activities, the fact that Board meetings were held at different locations around the region and the suggestion that the organisation was critical for the region were key comments. An interviewee thought the organisation had developed good promotional literature and had initiated a good project in the relocation consultancy.

Suggested changes

Comments were also made in relation to aspects interviewees thought could be enhanced. A couple of interviewees thought the organisation could reduce the number of projects it was involved in and focus on a few strategic projects, to have a greater completion rate (this could be gradually progressed).

One interviewee suggested that, while there was a requirement for the General Manager/Executive Officer to be an effective political player, this role could be complemented by a new role of a hard-headed, experienced development manager, basically equal in status to the General Manager/Executive Officer but shielded by him from the political aspects, able to just get in and do the job.

An interviewee also thought there would be benefits from closer liaison between General Managers/Chief Executive Officers of the various regional economic development organisations.

Appendices

Appendix 1 – Interpreting the theoretical framework

Strategy Element	Description	Interpretation
Organisational		
Leadership	regional leadership on economic development	Are community leaders involved? Do people see the organisation as a leader? Are there other regional economic development bodies?
	leadership on strategic planning	Is someone driving strategy processes on an ongoing basis?
Purpose	shared understanding of general purpose of organisation	Do people seem to have the same impression of the general purpose? Are similar words or concepts used to describe it? Are the same words used in documents?
	shared understanding of specific goals of organisation	Can interviewees give the same details about why the organisation exists and what outcomes it ultimately wants to achieve? Are these specific or general? Are these reflected in any documents?
Member to member relationships	a strong relationship between members, including awareness of each other	Do most interviewees refer positively to other members? Are relationships thought to be good? Is there a sense of trust?
Roles and responsibilities	clarity of roles and responsibilities within and for the organisation	Is there a shared sense of the actual role of the organisation, including what may be within it and outside it? Do the roles and responsibilities of individuals within the organisation seem to be well understood?
Implementer involvement	involvement of implementers in strategy formulation	Who is involved in implementing decisions? Did they have input into the formulation of the strategic plan?
Process		
Knowledge	knowledge generation and sharing in relation to specific projects	Is knowledge sought in relation to specific projects? Is knowledge shared within the organisation in relation to specific projects?

	general knowledge generation and sharing	Is knowledge sought in relation to the overall economy, performance of the organisation, and competitors? Is theory or expert advice sought? Is this knowledge shared within or outside the organisation?
Analysis	project or issue focused analysis	Is knowledge applied and considered in relation to specific projects or issues? Are any tools used to aid analysis in relation to projects or issues?
	analysis based on economic drivers, including competition	Is knowledge based on economic drivers, competition, theory, external advice and the performance of the organisation applied and considered in relation to the overall strategic direction of the organisation and its activities? Are any tools used to aid analysis? For example, considering possible scenarios of different actions and the outcomes that each might have. Considering possible future scenarios and how they might impact on the organisation. Comparing the organisation to other organisations. Considering outside organisations and their motivations and possible actions.
Options evaluation	options evaluated in relation to strategic plan	Are different options considered before making a decision? Are these options evaluated in relation to how they contribute to achievement of the overall strategic plan or the organisation's long term goals?
Emergent strategy	emergent approach	Are there consistent decisions made that are aimed at achieving specific organisational goals? Are there actions, plans or projects that are agreed in response to analysis or changes in the internal or external environment or projects that are not specified in a strategic plan?
	recognition of emergent projects in strategic plan	Are these projects included in the strategic plan after being taken on?
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	monitoring of progress in relation to strategic plan	Is the progress of the organisation against its strategic plan monitored in any way?
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Reference to strategy	constant reference to strategy	Is the strategic plan regularly referred to by members and staff? Is it referred to at all?
Outputs		
Vision	a meaningful, clear, shared vision for the organisation	Is there an agreed future that is perceived as the aim of organisational efforts? Is this incorporated into a vision statement? Is it visual/able to be imagined from the description? Is there a shared awareness of this vision?

Long term plan	a specific, agreed long term plan or goals	Are there any intended actions over a time horizon of greater than 5 years into the future? Does this include desired outcomes of the actions in some form? Is there a shared awareness of this plan?
Formal document	a formal document that outlines the long term plan and strategy	Is the organisation's strategy and planning published in a formal document? Who has a copy of the document?
Priorities	ordered priorities	Are key strategic areas indicated by ordered priorities? Is this used as a guide for activities and new projects?
Performance measures	project specific performance measures	Performance measures involve determining how the organisation will tell if something has been successful. Are specific measures agreed before a project of initiative is started?
	overall performance measurement framework	Is there an overall set of measures tied to the long term plan and linking to projects and activities, determined in advance to indicate whether an organisation is successful?
Implementation plan	implementation plan	Is there a single implementation plan that records decisions about what activities must be undertaken to achieve the long term plan, who is responsible, what priority the activity is, when it is to start and finish and how success will be measured?
Communication of strategy	communication of strategy	Is the organisation's strategy and long term goals communicated to the membership base and general community? How often and how?
Characteristics		
Realism		Does the plan take account of challenges in the context? Are goals thought to be realistic given available resources?
Relevance		Is the plan relevant to the activities of the organisation? Are the activities relevant to members? Are processes relevant?
Creativity		Is the status quo ever challenged? Are different ways of approaching an issue considered? Are different options put forward? Is there debate over options? Are tools such as brainstorming or scenarios used?
Clarity		Are strategies, statements, measures, goals, etc specific enough that there is only one possible interpretation?
Consistency		Are activities consistent with the strategic plan or each other? Are processes used consistently? Are measures applied consistently?

Complementarity	Are there activities or projects initiated outside the organisation that complement those of the organisation, particularly in terms of achieving long term goals? Is there awareness of interrelationship of activities and potential synergies?

Case Report

Case 3

Overview

Purpose of this report

This report has been prepared for General Manager/Executive Officer of the [*Regional Organisation*] for the following purposes:

- to share raw findings of the research to date

- to provide a basis for further discussion, particularly on any elements that need reconsidering

- to identify gaps in the document analysis

As with all stages of the research project, participation in a review of this report is optional, and a lack of response will be interpreted as no further comment necessary.

Publication of results

This report has been produced specifically for the above purpose. Any information from this report to be used in my thesis or other publications of results will not use the name of the organisation or refer to any individuals in the region by name.

Requested action

It would be greatly appreciated if [*Name*] could read this report and contact me either by email or phone to suggest any amendments to the report, including any elements that need to be reclassified in terms of being present or absent. While the suggested reclassification may not be adopted in every situation, feedback from [*Name*] will be given full consideration. If there are any gaps or corrections related to a key document being missing from the document analysis, it would be appreciated if a copy of that document could be provided. All documents not publicly accessible (eg. available on the internet) are treated as confidential and stored in a secure location.

Further reports

The thesis will involve analysis of the results and conclusions and recommendations across all three cases. A general and brief summary of results will be provided to all interviewees.

Case results

Background

The [*Regional Organisation*] is concerned with an area incorporating eight local government areas. The region is an industrial and rural area, with a specialisation in mining and agriculture (OESR). The region is 90,340km^2 with an estimated resident population of 143,699 (2004p OESR). In the year ended June 2005, building approvals totalled $523.4m. Residents had a mean taxable income of $39,960 in 2002/03, slightly above the Queensland total.

The [*Regional Organisation*] was established in 1999 to be the peak economic development organisation for the region. Originally the organisation was supported by a significant funding contribution from the [*State government department*] and did not receive any other operational funding. Changes within the region in 2003 saw the economic development arm of [*Name*] join [*Regional Organisation*], which brought a membership base to the organisation. This membership base of 46 organisations includes local government, major corporate, and small/medium enterprises. The operational budget of the organisation is drawn from a continuation of the original Queensland government contribution and membership fees. Project funding is a combination of the above funding and grants from local, state and federal government. The organisation is administered by a small staff and overseen by a Board of Directors.

The preparation of this case study involved six interviews with Board members, staff, and representatives of other organisations in the region. Interviewees' association with the organisation varied from nine months to six years. A document analysis was undertaken and included [*Regional Organisation*] publications, local government annual reports and corporate plans and documents produced by member organisations.

Detailed results

Organisational elements

Leadership

The interviews identified a number of factors that contributed to a conclusion that regional leadership on economic development was absent. More than one interviewee suggested that there are a number of economic development agencies in the region and limited coordination across them. One interviewee suggested that there was limited awareness of who was on the Board in the broader community. The document analysis revealed that the organisation promotes itself as the peak economic development body in the region and one interviewee raised this and stated that it was not the case. Another interviewee challenged the idea stating that it was unpalatable as everyone liked to think they were the leader. Few community leaders had elected to become involved in the organisation. In terms of leadership on strategic planning, while there were attempts by General Managers/Executive Officers to develop various strategic plans, there did not appear to be an ongoing process.

Shared understanding of purpose and goals

A common perception was that the organisation was not achieving its original purpose and that the current purpose was not clear. When asked to identify the purpose of the organisation, some interviewees used similar terms, however, others raised concepts that

were not identified by most interviewees. The element of a shared understanding of the general purpose of the organisation was partially present. In terms of a shared understanding of the specific purpose and goals of the organisation, the diversity of views raised by interviewees and the lack of a clear definition for economic development suggested that this element is absent.

Member to member relationships

Overall, member to member relationships were not good and this element is concluded as absent. While interviewees referred positively to some members, others were singled out as negatively impacting on the organisation. Competition was identified as an issue, with one interviewee suggesting that parochialism increased with each additional person involved. While some interviewees thought there were no hidden agendas, others referred to things going on behind the scenes that might be upsetting to some players and expressed shock at the reasons some members are involved. Some interviewees reported a decline in relationships and some reported an improvement. One interviewee stated that the teamwork approach was deficient and this appears to be the case for the overall organisation, despite the evidence of some positive relationships between some members.

Roles and responsibilities

Interviewees had very specific ideas about what the role of the organisation should be and few comments on what the role actually was, which suggests that there is dissatisfaction with the current role. There were implications of confusion of the role with that of the Regional Organisation of Councils and the [*State Government Department*], and local bodies.

Comments that related to the role were sometimes confusing and very broad. For example: take on projects of regional significance, but also take on others; and implement, but not always implement. A broad range of terms were identified to describe the role including: seeks funding; organises training; facilitate; coordinate; broker; lead; initiate; implement; provide information and statistics; administrate; and try to keep momentum going. The organisation's website provided the most detail and was consistent with some statements made by interviewees, although there was no clarification of the role of the organisation in relation to other organisations in the region. The interviews also identified that there was a perception that the claim of being the peak economic development body in the region was false, but that it was an appropriate role for the organisation to take on. Roles within the organisation did not draw as many comments, although one interviewee suggested that Board members need to be more aware of their roles and responsibilities. Clarity of roles and responsibilities was not present.

Involvement of implementers in strategy formulation

Interviewees generally agreed that the organisation was not always the implementing body. Some suggested that its planning processes had become less inclusive and others questioned whether past planning had involved a group at all. Neither of the staff members internally responsible for implementation of the plan were involved in its development, although in terms of current operations, it was felt that the Board encouraged staff input into its deliberations. This element was not present.

Strategy processes

Knowledge generation and sharing

As an element, knowledge generation and sharing was present in the case. The interviews and document analysis identified formal mechanisms for knowledge sharing, including: quarterly members' forums; meetings; formal briefing templates; distribution of regional economic statistics; and a members' newsletter. However, a few interviewees suggested that there was a lack of openness internally in past years. One interviewee stated that they were very satisfied with the level of information provided to the Board this year. An interviewee expressed some frustration regarding a perceived lack of coordination regarding economic development practitioners across the region, and nearly all interviewees mentioned a sub-regional forum initiated outside the organisation. In terms of knowledge generation, the document analysis identified external sourcing of information, including comparative information with other regions.

Analysis

Analysis was identified as having to consider whether a proposed initiative meets a funded key performance indicator and whether it has regional or sub-regional significance. One interviewee suggested that there is good debate over options, another suggested analysis considered the size of the project, funding available, possible outcomes and other qualitative factors. Negative comments from interviewees included that the major factor in analysis was political pressure and that a requirement for analysis of economic strengths of the region as part of decision making was not being met. An interviewee gave examples to suggest that in the past, good analytical tools had present but were not used correctly or transparently. Given these responses, it is concluded that project specific analysis is present and analysis related to economic drivers is partially present.

Options evaluation

Despite the presence of a project brief, the options evaluation process was thought to be different for every project. Rather than alignment with the strategic plan, consistency with key performance indicators was identified as the major factor, although one interviewee thought there was a good link between these indicators and the strategic plan. An interviewee suggested that business cases were used to assist decisions and it appears as though alternative approaches are suggested almost as a fall back if the favoured option does not suit. An interviewee stated that sometimes the decision is based on just one factor and another suggested that there was no broad economic analysis behind it. Overall options evaluation in relation to the strategic plan is not present.

Emergent strategy

There were differing views on the proportion of planned and emergent strategy used. One interviewee expressed a reluctance to turn projects away, another suggested the approach was 90% reactive, another said more responsive than proactive. It was suggested that the smaller projects are emergent and an interviewee also thought that the external projects seeking funding were generally emergent.

A review of projects being undertaken suggests there are some consistencies across initiatives that may be evidence of emergent strategy. There were also a number of initiatives identified that linked to regional plans. This element is present.

Review of strategic plan

This element is partially present. Some interviewees felt there was a lack of strategy review. One interviewee suggested that a review took place every six months with the

review of state government funding key performance indicators. Another interviewee thought that the development of the current strategic plan involved a review of the previous one.

<u>Monitoring of progress</u>

Progress monitoring occurs on a project specific basis through a report at each meeting, a members' newsletter and the annual report to members. Interviewees complimented the organisation on the members' newsletter for the information it provided on current projects. Monitoring of progress in relation to the strategic plan is partially present due to the review of progress against key performance indicators.

<u>Constant reference to strategy</u>

A couple of interviewees stated that they referred to the plan regularly, but most said they either don't have a copy or don't look at it. One questioned whether the Board members looked at it. This element is partially present.

Strategy outputs

<u>Vision</u>

A few interviewees thought that there was a vision, but they did not agree on what was in it. One interviewee suggested that there were several regional visions and another stated that the vision he saw was a motherhood statement. The document analysis did not identify a vision on the organisation's website or on its member newsletters. There is an absence of a regional vision.

<u>Long term plan</u>

There is a partial presence of a long term plan. Interviewees were mixed on whether one existed or not. While one thought there was no strategic approach whatsoever, others suggested that the organisation was working towards the achievement of the [*Name*] Regional Plan, developed by the State Government. The organisation's last two strategic plans have followed a four to five year timeframe, suggesting that goals are short to medium term. In the interviews, generally only one vague long term goal was identified. Interestingly, one interviewee stated that most projects were actually long term in nature.

<u>Formal document</u>

There is a formal strategic plan for the period 2003-2008. This was confused by some interviewees with the previous plan, dated 2001-2005. Not all interviewees had a copy of the current plan and there was some uncertainty as to whether all Board members had a copy.

<u>Priorities</u>

No interviewees were able to identify ordered priorities in relation to the activities of the organisation. However, some did think that priorities were present. One interviewee stated that they related to funding deadlines, another said that they were set by the Board on advice from the General Manager/Executive Officer. It was also suggested that there is an intentional lack of priorities to provide flexibility to work on the run. Other comments were that it seemed to be chaotic most of the time, that staff were expected to do everything at once, that groups were able to push their own agendas, and that perhaps Board members viewed the priorities as different. The organisation's electronic newsletter lists priority projects, however, it's not clear whether they are the only projects underway or how they were prioritised.

Performance Measurement

Predetermined performance measures for individual projects were not identified. One interviewee stated that project plans were not prepared for funding requests so the desired outcomes were not clear. Discussion of projects in the members' newsletter and organisation's annual report do not refer to any specific measures.

Overall performance reporting is thought to be both qualitative and quantitative. An interviewee referred to the state government funding key performance indicators as the main measures and stated that a review took place against these measures every six months. The recognition of these measures in the strategic plan was pointed out, although they were identified as being too broad and massaged every twelve months. Another interviewee suggested that the funding had been continued for seven years, meaning the organisation must have been performing satisfactorily on those measures. Yet another interviewee also thought the organisation was performing well, reporting that their interests were gaining important representation within the region. Other possible measures identified in the interviews were timeliness of provision of information, number of enquiries generated and attracting business to region.

Not all interviewees were positive however. Some felt that return on investment/public money was an important measure and one stated that the organisation was perceived as always seeking funding and not delivering anything. One interviewee thought the lack of awareness of the organisation's role and activities meant there were different expectations and therefore the organisation wasn't meeting them. Another thought the organisation was directly responsible for any unreal expectations and went on to say its credibility had been affected by claiming projects that it was not responsible for. In summary, predetermined measures for individual projects are not present but performance reporting is thought to be present, although there are widely differing views as to whether the organisation was performing well.

Implementation plan

There is an absence of an implementation plan. The organisation has a business plan, but one interviewee thought it wasn't specific enough to be used as an operational plan with the key performance indicators serving this purpose instead. Another interviewee said that specific implementation plans were lacking, particularly in relation to funding applications. While an interviewee stated that the strategic plan had milestones to mark timing deadlines and another said that funds were allocated to projects at the start of the year, there was no evidence of an implementation plan being used to guide effort.

Communication of strategy

There did not appear to be any communication of overall strategies to the community or the organisation's membership base. While interviewees listed communication methods such as a brochure, media, government relations, website and email bulletins, the document analysis found no reference to an overall strategy. One interviewee thought more specifically targeted communication was required, another thought that some members contributed by communicating what they were involved in.

Completed actions and projects in progress

Some interviewees expressed the view that the organisation had not been delivering, however, all interviewees were able to identify a few projects in progress. This information was combined with the document analysis to review the extent of implementation. Projects that appeared to be completed related to functions or training held, funding

applications submitted or feasibility studies completed, generally followed by initiation of a further step in the project. While the projects cover a broad range, some consistencies and interrelationships can be seen. This analysis suggests that there were a number of projects in progress and some components of projects completed. In terms of the completion of entire projects, only one was identified and one interviewee suggested it had since been closed down.

Characteristics

Realism

The interviews brought out mixed views on the presence or absence of reality in the case. Interviewees thought it was missing in terms of the organisation not taking its own capabilities into account, making untrue or misleading claims in terms of projects it was responsible for, the likely success of projects and the role of the organisation. One interviewee stated that the five year strategic plan was unrealistic given that funding timeframes were three years. Another interviewee thought that the organisation was under-resourced for the large area it was attempting to cover and another thought it would be a huge task to achieve everything in the strategic plan (because of the large scope of the plan).

Comments by interviewees suggesting the presence of realism included that the boundaries were in fact appropriate, that the Board understood the resourcing challenges, that the organisation needed to progress slowly to be sustainable and that there was a good understanding in one member organisation of links across the region and the need for a regional approach. The document analysis identified some awareness of the competitive environment and reference to the economy. Realism is determined to be partially present.

Relevance

One interviewee thought the strategic plan was relevant, stating that it would be great if the plan could be achieved, however, most interviewees implied that relevance was lacking. One thought that there could be a better link between current tasks and the aim of the organisation. Another thought that the major offering of the organisation may not be directly relevant to some members.   An interviewee said that the sector being targeted by the organisation was too broad. There was a suggestion that the [*State Government Department*] imposed projects on the region at times without being aware of the impact of them. One interviewee referred to the difficulty maintaining relevance for the strategic plan because things changed too quickly.   Relevance was thought to be partially present.

Clarity

Clarity was only positively identified once in relation to an improvement in the clarity between the 2001-2005 and 2003-2008 strategic plans. Other interviewees thought it was absent. One questioned the desired outcomes of the organisation, stating that there was too much propaganda and not enough clarity in terms of how the organisation's current activities linked to its aims.   Another stated that there was often not clearly defined objectives. This was supported by an interviewee comment on the 'motherhoody' nature of the vision they recalled seeing on the organisation's website.   An interviewee thought that there were no clear guidelines provided by government, another questioned what sustainability was and suggested that it was important for all involved to know what the key performance indicators were.   An interviewee referred to a general tendency to pass everything on to development officers due to a lack of clarity around the role. Clarity was concluded as being absent.

Creativity

Creativity was also thought to be absent. While one interviewee stated that there was a need to be innovative due to the limited resources, other interviewees suggested that there was no time for creativity, that it hadn't been seen recently, that there was nothing new in the projects underway, and that there was not much scope for creativity. An interviewee expressed the concern that the current strategic plan was developed by only one person. Another thought that outsiders tended to challenge decisions more than insiders, which implied less of an innovative culture.

Consistency

Consistency is partially present. An interviewee suggested there was some consistency between different plans and the document analysis supported this. One member reported that they wrote regional priorities into their own strategic plan. Another stated that funding is provided to projects that are consistent with the organisation's strategic plan. The review of projects found some consistency between activities, although the document analysis could not find evidence of this consistency being communicated.

Some interviewees thought there was confusion over what the role of the organisation meant it should take on and what it shouldn't and that this led to some people questioning its activities. An interviewee suggested that some other regional plans are not consistent with the organisation's strategic plan or activities because those groups weren't consulted. There also seemed to be projects being undertaken that were related to the plan but not identified specifically within it.

Complementarity

Complementarity is partially present in this case. An interviewee suggested that the role held by the chair in his own organisation provided a means for the activities of both to complement each other. Another interviewee reported on contributions made by an individual who was not a member but agreed with the cause. There was an example raised about a project being stalled by a member organisation who did not consult the regional organisation. One interviewee claimed that previous discussions on projects within the region held across relevant organisations didn't happen any longer, and that the regional organisation was no longer the prime referral point for general queries.

Challenges

The challenges identified by interviewees relate to the external environment, funding, member base, priorities, measures and activities and others. An interviewee thought the impact of decisions made outside the region, such as government programs, presented a challenge. Consistent with this was the idea that sometimes there were other forces at play that affected a project and could not be controlled. Also, an interviewee suggested that changes in the environment were also a challenge.

Interviewees thought that there was too great a reliance on government funding, that because of this there was no security or future for the organisation and that securing funding was sometimes difficult because no arm of government wanted to be the first to commit. There was a perception that the organisation's running costs were not met by funding, that it had considerably limited resources and that often there was no spin-off from funded projects. An interviewee thought that there were often different agendas to access different funding and another thought that the requirement for the strategic plan to be in line with funding presented a challenge.

The membership base was thought to bring challenges. These included parochialism, or the idea that all members have their own agenda. Interviewees thought that individuals had quite an impact on the organisation in terms of putting up obstacles, some being difficult to work with, or having a difficulty committing to initiatives. There was a perceived splintering within the organisation, perhaps due to competition between members. Interviewees thought that members were often too busy to focus, that complexity increased with every additional member, that smaller members took more effort (particularly because small business needs short term benefits) and that more work was required on increasing membership but that the organisation couldn't afford to divert resources to do it. There was a concern that political interference led to a lack of independence, forcing the organisation to meet particular outcomes (causing it to be railroaded by government policy or hampered by bureaucracy). An interviewee also suggested that some insular people are sceptical about some things, making it harder to get things happening.

Other challenges raised in the interviews were: that the name of the organisation didn't represent the region; that the organisation can't be the regional body when there are other development organisations within the same area; that the region was too large and diverse and economic development did not fit within a geographic area; and that economic development could vary depending on whether it was perceived as micro or macro development. The time involved in devising strategies was raised, as was the idea that planning was just one more thing that had to be done. An interviewee suggested that the organisation had been in a state of flux for three years, which didn't help it to achieve outcomes. Another statement was that the small size of the organisation presented a challenge, that it needed to spend half its time on administration and that a strategic approach didn't fit due to the size. An interviewee also suggested that it was hard for small projects in regional development to stack up against larger ones, especially when competing for funds.

Positive feedback

Interviewees were asked to identify positive aspects of the organisation. One stated that they thought it was brave of the organisation to open up to the research investigation. Another statement was that while the organisation had faced some difficulties in the past, it had the best chance of moving forward positively with the current General Manager/Executive Officer. An interviewee thought the structure was positive, with good potential for engagement and delivery and another felt they had a good relationship with the organisation. One interviewee praised a recent advertising campaign. Another specific comment was that one sub-region felt it had gained a level of representation at the regional level through being involved in the organisation.

Changes

Interviewees made a large number of suggestions for things that could be done to improve regional collaboration and strategy. These range from small adjustments to processes to radical changes such as another organisation taking over the role. A few interviewees talked about the need to clarify the goals and activities of the organisation. One suggested the best way to do this might be to close the office for a week and spend that time reviewing, rather than trying to continue forward with the current confusion. In terms of providing this clarity, there were suggestions for more specific key performance indicators, for a better awareness of these indicators across the membership, for a clearer link between funding and the activities and aims of the organisation (even funding sourced for specific projects) and to clarify outputs and then break them into specific time chunks

(what will be delivered long term, what three month, six month, twelve month, three year etc outcome will be delivered as part of moving towards this end goal). When selecting outcomes, an interviewee suggested that risk must be managed, perhaps through considering which outcomes have the best chance of a win.

An interviewee also suggested that strategy must come first and structure second. Also, that members need a reason for being involved. An example of a successful structure was given as Townsville Enterprise Limited, where all economic development matters are directed to the organisation from local and state government in the first instance. An interviewee thought that there was much to be gained by a greater awareness of other regional economic development organisations and recommended that formal interaction between them be initiated by the [*State Government Department*].

Changes were suggested in relation to the Board. One interviewee thought the Board could be more receptive to problems and seeking resolution (there was a perception that the Board was not assisting with resolution of identified problems). Another interviewee felt that more conflicts of interest needed to be declared up front. A suggestion was also made to review the membership of the Board and involve more economic development practitioners rather than the current political appointments. Another interviewee suggested that the organisation could be three times as effective with twice the funding. A suggestion was also made with respect to the perceived uncertainty of funding – try for three year, rather than twelve month memberships.

The most significant changes suggested included to change the area grouped as the [*Regional Organisation*] region to be a smaller area and with a specific economic development commonality. A number of comments were made in relation to the possibility of another organisation taking on the role currently filled by the [*Regional Organisation*]. While some interviewees were concerned about this idea, some were undecided or supportive. The wide range of comments made with respect to desired changes did not always complement each other, however, there was a general feeling that something needed to be done to resolve perceived issues.

Appendices

Appendix 1 – Interpreting the theoretical framework

Strategy Element	Description	Interpretation
Organisational		
Leadership	regional leadership on economic development	Are community leaders involved? Do people see the organisation as a leader? Are there other regional economic development bodies?
	leadership on strategic planning	Is someone driving strategy processes on an ongoing basis?
Purpose	shared understanding of general purpose of organisation	Do people seem to have the same impression of the general purpose? Are similar words or concepts used to describe it? Are the same words used in documents?
	shared understanding of specific goals of organisation	Can interviewees give the same details about why the organisation exists and what outcomes it ultimately wants to achieve? Are these specific or general? Are these reflected in any documents?
Member to member relationships	a strong relationship between members, including awareness of each other	Do most interviewees refer positively to other members? Are relationships thought to be good? Is there a sense of trust?
Roles and responsibilities	clarity of roles and responsibilities within and for the organisation	Is there a shared sense of the actual role of the organisation, including what may be within it and outside it? Do the roles and responsibilities of individuals within the organisation seem to be well understood?
Implementer involvement	involvement of implementers in strategy formulation	Who is involved in implementing decisions? Did they have input into the formulation of the strategic plan?
Process		
Knowledge	knowledge generation and sharing in relation to specific projects	Is knowledge sought in relation to specific projects? Is knowledge shared within the organisation in relation to specific projects?
	general knowledge generation and sharing	Is knowledge sought in relation to the overall economy, performance of the organisation, and competitors? Is theory or expert advice sought? Is this knowledge shared within or outside the organisation?

Analysis	project or issue focused analysis	Is knowledge applied and considered in relation to specific projects or issues? Are any tools used to aid analysis in relation to projects or issues?
	analysis based on economic drivers, including competition	Is knowledge based on economic drivers, competition, theory, external advice and the performance of the organisation applied and considered in relation to the overall strategic direction of the organisation and its activities? Are any tools used to aid analysis? For example, considering possible scenarios of different actions and the outcomes that each might have. Considering possible future scenarios and how they might impact on the organisation. Comparing the organisation to other organisations. Considering outside organisations and their motivations and possible actions.
Options evaluation	options evaluated in relation to strategic plan	Are different options considered before making a decision? Are these options evaluated in relation to how they contribute to achievement of the overall strategic plan or the organisation's long term goals?
Emergent strategy	emergent approach	Are there consistent decisions made that are aimed at achieving specific organisational goals? Are there actions, plans or projects that are agreed in response to analysis or changes in the internal or external environment or projects that are not specified in a strategic plan?
	recognition of emergent projects in strategic plan	Are these projects included in the strategic plan after being taken on?
Monitoring of progress	project specific monitoring of progress	Is the progress of specific projects or initiatives monitored in any way?
	monitoring of progress in relation to strategic plan	Is the progress of the organisation against its strategic plan monitored in any way?
Review	review of strategic plan/direction	Is there a regular review of the strategic plan or direction of the organisation? Is there ever a review?
Reference to strategy	constant reference to strategy	Is the strategic plan regularly referred to by members and staff? Is it referred to at all?
Outputs		
Vision	a meaningful, clear, shared vision for the organisation	Is there an agreed future that is perceived as the aim of organisational efforts? Is this incorporated into a vision statement? Is it visual/able to be imagined from the description? Is there a shared awareness of this vision?
Long term plan	a specific, agreed long term plan or goals	Are there any intended actions over a time horizon of greater than 5 years into the future? Does this include desired outcomes of the actions in some form? Is there a shared awareness of this plan?

Formal document	a formal document that outlines the long term plan and strategy	Is the organisation's strategy and planning published in a formal document? Who has a copy of the document?
Priorities	ordered priorities	Are key strategic areas indicated by ordered priorities? Is this used as a guide for activities and new projects?
Performance measures	project specific performance measures	Performance measures involve determining how the organisation will tell if something has been successful. Are specific measures agreed before a project of initiative is started?
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