

**Business Planning and the New Public Management:
An Ontario Perspective**

Tom Wesson

David Barrows

Schulich School of Business

York University

Abstract

This paper shows how New Public Management theories affected the restructuring process in the Ontario Public Sector (OPS), beginning in 1995, by examining the changes that were implemented within the Ontario Ministry of Community and Social Services or MCSS, (which was later renamed the Ontario Ministry of Community, Family and Children's Services or MCFCS), and a not-for-profit social service agency. NPM was embraced by the Conservative government which was in power from June 1995 to October 2003. The Conservatives spearheaded many changes including introducing business planning as a compulsory exercise for their various ministries. This paper shows that many of the NPM techniques implemented by the government were considered positive by the employees working within the MCFCS such as more entrepreneurial managerial techniques and the increased use of technology. Nonetheless, many workers complained of an incomplete linkage between ministry business planning and agency activities. The paper suggests, therefore, that NPM has produced some positive benefits but an overall assessment cannot be made until more information is available.

Key words: New Public Management (NPM), Alternative Service Delivery (ASD), business planning,

Large-scale public sector reforms have been initiated by governments all over the world in response to growing disenchantment amongst their constituents with the traditional Weberian model of bureaucracy. Other factors such as globalization, expanding deficits, and technological advancement have also heavily influenced the profound changes that have taken place in governmental policy. One phenomenon that has spearheaded many restructurings is a discipline commonly referred to as the New Public Management (NPM). Despite the fact that NPM has already been responsible for an enormous amount of upheaval, it is not a theory that is easily definable. The New Public Management embodies several different concepts, loosely intertwined, which have been instrumental in making public sector reforms. Thus far, these reforms have led to a reduction in government spending, more managerial autonomy, and a shift to a more flexible/electronically dependent work environment. Although NPM is difficult to categorize several broad themes become visible when this ideology is analyzed. NPM is critical of the traditional bureaucratic model and believes that government services should more closely resemble what is provided within the private sector (Pal, 2001, p. 193). Thus, public sector services must become more entrepreneurial, client-focused and concerned with the implementation and management of programs (as opposed to the development of policy) (Charih and Daniels, 1997, p.31).

This paper examines how NPM theories affected the restructuring process in the Ontario Public Sector (OPS), beginning in 1995, using the Ontario Ministry of Community and Social Services or MCSS, (which was later renamed the Ontario Ministry of Community, Family and Children's Services or MCFCS), and a not-for-profit social service agency, as the focal point for our analysis. By examining the major policy documents guiding the MCSS/MCFCS, and demonstrating that they were heavily influenced by the New Public Management, the paper shows that the Government of Ontario had by the late 1990's incorporated many of the principles espoused within the New Public Management.

This paper examines the restructuring project in MCSS/MCFCS, paying special attention to the business planning process as the central tool used for guiding changes to the Ministry.

The Business Planning Process

Immediately after the 1995 election, the newly instated Conservative government began implementing broad changes across the bureaucracy significantly altering the composition of the province's public service. By fiscal year 1996/97, the government introduced a province-wide system focused on Business Planning (BP) that became compulsory for all of the ministries. It is important to note that the Liberals, elected in 2003, have discussed altering the use of compulsory business plans however as of this writing no new changes have been announced by the government. In fact the Ministry of Community, Family and Children's Services still has the 2002-2003 Business Plan listed on its website. This is the plan created by the previous Conservative government.

The current system has not yet been eliminated and it is still being used by province (MCF CS, <http://www.cfcs.gov.on.ca/CFCS/en/busPlan/default.htm>).

The Business Plans closely emulate what can be found within the private sector and contain the following information:

Identify the core business of the ministry

Outline areas where cost savings are possible, and

List any services that can be more effectively provided by nonprofit or private sector agencies.

In addition to the fiscal and ideological imperatives, there were other reasons behind the government's eagerness to introduce business plans. One factor that created an impetus for change was globalization, because it leads to competition amongst bureaucracies. Another factor listed by the Restructuring Secretariat, was the advancement of information technologies, which

were seen as both a driver and enabler of change (Ontario Public Service Restructuring Secretariat, Cabinet Office, April 2000).

Technology is viewed as driving change in that, in the context of globalizing capital, it increases competitive pressures. Those jurisdictions (in both the public and private spheres) that are best able to adjust to these new competitive pressures are seen to be most capable of economic prosperity. At the same time, new technology enables change because it facilitates the speed-up of administrative processes as well as a greater degree of networking.

Alternative Service Delivery (ASD) is another popular approach that has been incorporated into the government's restructuring process. ASD, a mechanism for delivering public services, is often connected to privatization, when public sector activities are turned over to private sector providers. However, with ASD there are many other options available, such as devolution, partnerships, licensing and franchising which the government considers whenever it looks at a program (Ontario Public Service Restructuring Secretariat Cabinet Office, April 2000).

In 1999 the Ontario Public Service Restructuring Secretariat **in the** Cabinet Office released, *Alternative Service Delivery in the Ontario Public Sector*, outlining the proper way to implement ASD endeavors. The document states that ASD should be used to "provide quality service, focus on core business, decrease spending, balance the budget, eliminate barriers to business, and create a prosperous economy" (Ontario Public Service Restructuring Secretariat, Cabinet Office, August 1999).

Moreover, it states that ASD has to fit in with the government's overall vision, clients' needs and with the ministry's business plan. The choice of delivery mechanism has to be viable from a business standpoint, provide value for the dollar, protection of public interest, and direct delivery must be used only when necessary, and then must use business-like practices. As long as policy objectives are met, private profit will be allowed. This document also suggests a growing connection between government and non-governmental agencies/organizations working

The Innovation Journal: The Public Sector Innovation Journal, Vol. 10(2), article 24. closely together to develop plans and structures for the delivery of services. Furthermore, it states that these networks of stakeholders should be given autonomy when developing their own ASD models, implying a fairly rigid division between the setting of broad policy goals and the administration of programs.

In a document entitled *Transforming Public Service for the 21st Century*, the Restructuring Secretariat outlines the government's goals and the methods used for achieving them. It is clear from an examination of the content of the text, and the bibliography included, that NPM is the guiding principle of restructuring, focusing primarily on cost reduction and customer service, but also including decentralization and flexibility in administration. This document also highlights business planning as the means by which restructuring is accomplished. Moreover, planning is used as a means to facilitate organizational learning (Ontario Public Service Restructuring Secretariat, Cabinet Office, April 2000).

In order to facilitate change, the Restructuring Secretariat was directed by the government to benchmark OPS practices against national and international public sector organizations. Further to this, the OPS were to use private sector restructuring and existing experience and examples of NPM as a guide to focus on cost effectiveness and customer satisfaction.

As can be seen from the literature published by the OPS, Business Plans were seen to be central to the restructuring process, which, itself, was driven by existing models of NPM. Business Plans are compulsory annual reports, covering a four-year period, the first year of which represents the budget for the next fiscal year. They are required to show how Ministries will achieve their fiscal targets and how they will account for implementing policies and evaluating results (Ontario Public Service Restructuring Secretariat, Cabinet Office, April 2000). The 1995-96 budget also demands that future Business Plans address accountability and service

delivery structures, as well as measurement of progress for stated goals and reasons for changes from previous plans (Ibid).

For the OPS, business plans take two forms. The first, and most visible form, is the business plan as a communications tool. These plans are intended to provide a brief statement of the objectives of the ministry, provide an outline of core business and ministry goals as well as a record of accomplishments. The stated intent of this manifestation of the business plan is to make the OPS more accountable to the public in general (not necessarily ministry clients in particular), and to provide measures of how well the ministry meets its objectives. This new terminology has led to some unforeseen problems. MCSS clientele consists of the poor, disabled persons and children. The Ministry has decided to define some of these service users as clients, but not others. These decisions have consequently encountered some criticism.

The second form of the business plan is its use as the new framework for the estimates (budget) process. Business planning is the mechanism by which private sector practices and cost savings are introduced into various ministries. This process is highly centralized in the Management Board Secretariat (MBS), which issues annual “Business Planning Guidelines” with detailed instructions and a standardized, rigid structure for completion. An official from the MBS noted that compliance to the BP Guidelines is required, and that should a Ministry fail to fulfill the requirements outlined, it would be asked to re-submit its submission by the MBS Portfolio Management Branch, which is responsible for reviewing individual ministry Business Plans for compliance to Guidelines and policy directives. Currently, standardized guidelines serve the purpose of providing consistency in practices across ministries to facilitate the consolidation process rather than necessarily being best practices.

The BP process for Ministries is usually a six-month process, running from September to March. At MBS however, the administration of the BP process is year round, since Business

Planning Reviews to improve the process and update the annual Business Planning Guidelines, have become a routine practice from April to August at the Ministry.

As part of the BP Review, other jurisdictions are examined for benchmarking and to see where best practices in BP used national and internationally by public sector organizations, can be incorporated. Furthermore any changes in legislation or government policy are reviewed. These, as well as improvements or changes to the administration of the BP process, are incorporated into the subsequent year's Business Planning Guidelines.

An MBS official indicated the Review was a Ministry priority in 2003. Items to be discussed include: 1) linking outcomes with resources, where performance measures should be the link, 2) reviewing the purpose of Business Planning in decision making and developing the framework for Strategic Planning (to be linked to BP) and 3) reviewing the MBS role in the process, to ensure effectiveness and efficiency in planning and allocating resources for the BP process. The 2003 BP Review represents the first real strategic review at MBS of Business Planning since it was implemented province-wide.

The MBS Corporate Policy Branch is responsible for working with individual ministries to develop performance measures and evaluations. This process occurs outside the annual BP process and is an ongoing endeavor. The inclusion of performance measures within Business Plans as mandated in the 1995-96 Budget has not yet occurred. The MBS official stated that while the impact of funding toward predetermined performance measures must be reported in the BP process, currently, Ministries are not held to these outcomes since MBS is unable to enforce compliance.

The Business Planning process is highly driven by fiscal concerns as MBS works closely with the Ministry of Finance to set fiscal targets. Targets are communicated to the Ministries at the outset of the annual BP process. Despite the centralized process, Ministries still have flexibility in how services are to be delivered, demonstrating a division between broad policy

development and administrative functions characteristic of NPM. The business planning process is not used to solicit input from agencies of the ministry or from clients. Although input is not solicited during the process, communication with regional offices and agencies throughout the fiscal year can have an impact on the specifics of the final business plan. For example, submissions from regional offices can influence ministry proposals for new programs or spending reallocation. Furthermore, once the BP process moves from the initial compilation phase to the negotiation phase at a Ministry, only a select group of management (and experts if necessary), are involved in reviews with MBS staff. Once MBS is satisfied that the Ministry has complied with MBS targets, MBS will present and defend a consolidated BP to the Management Board of Cabinet for final approval,

Because the process is highly centralized in MBS, and because fiscal concerns are central in principle, it is necessary to establish that the Ministry we are examining **MCSS/MCFCS** has actually engaged in practices that have resulted in reduced expenditures.

Figures 1 and 2 present the estimates for **MCSS/MCFCS** from fiscal year 1998/99 to 2002/03. The ministry's operating budgets for income and employment supports and community and social services were reduced from 1998/99 to 2001/02 and stabilized in 2002/03.

Table 1: Ministry Resources as per Core Business (*All figures stated in millions of dollars*)

Core Business	1998-99	1999-2000	2000-01	2001-02	2002-03
Income and Employment Supports	Operating: \$5,357	Operating: \$5,098	Operating: \$4,688	Operating: \$4,613	Operating: \$4,456.1
Community & Social Services for People in Need	Operating: \$2,500 Capital: \$20	Operating: \$2,660 Capital: \$20	Operating: \$2,872 Capital: \$20	Operating: \$1,245 Capital: \$23	Operating: \$1,297 Capital: \$24.4
Business Supports	Operating: \$31	Operating: \$27	Operating: \$28	Operating: \$28	Operating: \$27.5
Children's Secretariat / Services	N/A	Operating: \$4	Operating: \$4	Operating: \$1,938 Capital: \$15	Operating: \$2,033.6 Capital: \$2.7
Ministry Total	Operating: \$7,891 Capital: \$20	Operating: \$7,792 Capital: \$20	Operating: \$7,592 Capital: \$20	Operating: \$7,824 Capital: \$38	Operating: \$7,814.5 Capital: \$27.1

Table 2: Ministry Administration Estimates

Line Items	1998-99	1999-2000	2000-01	2001-02	2002-03
Salaries and Wages	\$17,736,884	\$16,180,184	\$15,017,584	\$15,084,252	\$15,297,240
Employee Benefits	\$4,021,600	\$3,645,900	\$3,354,900	\$3,253,100	\$3,341,000
Transportation and Communication	\$1,615,200	\$1,326,700	\$1,291,300	\$1,352,600	\$1,352,600
Services	\$6,513,200	\$4,979,800	\$7,173,400	\$7,355,400	\$7,944,500
Supplies and Equipment	\$1,396,200	\$952,800	\$945,700	\$929,600	\$929,600
Transfer Payments	\$0	\$0	\$0	\$0	\$0
Recoveries	\$0	\$0	N/A	N/A	N/A
Total	\$31,283,084	\$27,085,384	\$27,782,884	\$27,974,952	\$28,864,940

Source: Ontario MCSS/MCFCS Estimates, various years.

MCSS/MCFCS Business Plans

Having generally outlined the business planning process for MSSS/MSFCS and some of its purposes and internal tensions, this section of the paper examines the contents of the plans themselves. Each plan (in its public ‘communications tool’ form) consists of five sections; Minister’s Message, Ministry Vision, Key Strategies and Commitments, Core Business, and Annual Report on Key Achievements.

Minister’s Message

This section highlights what are deemed to be the most significant successes of the Ministry over the preceding year. Each year outlines a reduction in caseloads for social assistance, praises the ministry’s attacks on welfare fraud, and outlines how well the ministry succeeded in meeting its targets for Ontario Works program. Moreover, this section outlines the main goals of the ministry for the coming year.

The restructuring initiative was first announced in the 1997/98 business plan, where MCSS specified the objectives of government restructuring as being investment in priority services, maintenance of safe and secure communities, cutting taxes and creating jobs, establishing the general targets of the government as well as indicating the neo-liberal underpinnings of the restructuring process.

In subsequent years, within this section the Minister mentions plans to introduce the Ontario Works program (1998-99), to implement mandatory skills testing (reading, writing and arithmetic) and mandatory drug testing for Ontario works recipients (1999/2000), to increase spending on programs for “Early Years Centers” and shelters for women and children (2001/02), and to develop and implement family support legislation focusing on tougher enforcement through the Family Responsibility Office (2002/03).

Ministry Vision

This section of the business plan remains constant from year to year, promising that the ministry will provide “an affordable and effective system of community and social services”. However, in the 2002/03 business plan, the Ministry was renamed the Ministry of Community, Family and Children’s Services (MCFCS). The vision statement for this year retracts the “social services” from the text, and instead clarifies the clients and role of the Ministry. The stated 2002/03 vision is “an effective and affordable system of community, family and children’s services” that supports and invests in families, communities and adults, as well as services to protect children and those most in need of support.

According to a senior government official at MCFCS, the name change of the Ministry represents the completion of the first phase of social welfare reform, i.e., the restructuring of the welfare system to crackdown on welfare fraud and the development of a new system to identify those truly in need. By 2001/02 drastic results had been achieved in this area and any remaining levels of fraud or errors in allocation of funds to those who the government would identify as not “in need”, were deemed systemic. The Ministry now seeks to increase its focus on serving the “true” users with assistance in the areas 1) income support, 2) community and family services, and 3) children’s services.

In all recent business plans, the ministry promotes individual and community independence, responsibility and accountability. In the 1997/98 plan, MCSS committed itself to this fundamental restructuring of the provision of community and social services, again highlighting the NPM project of the government.

Key Strategies and Commitments

This section, divided into about 4 subsections per business plan, sets specific goals for attainment over the coming year. Modifications in the business plan from year to year account for the changes in headings and content of each of the subsections. The first section generally deals with the welfare system, Ontario Works (OW), and measures taken to decrease caseloads and crack down on fraud. These items are summarized more thoroughly in Table 3 titled “Key Strategies and Commitments of MCSS/MCFCS.”

Section I – Key Strategies and Commitments

Figure 3: Key Strategies and Commitments of MCSS/MCFCS

	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03
	Make Welfare System That Expects People To Return to Work	Fundamental Transformation of Social Assistance	Fundamental Reform of Social Assistance	Build on Success of Social Assistance Reform	Build on Success of Social Assistance Reform	Build on Success of Social Assistance Reform
1	Ontario Works (OW) program	OW caseload to be reduced by 5%	OW caseload to be reduced by 4%	Increase OW placements	Commitment to double OW placements	Maintain OW municipal placement targets of 30%
2	Crackdown on fraud	15,000 cases of fraud to be found	Expand OW into private sector	Remedial training in math and language	Literacy testing and training	OW caseload is maintained at or below 2001/02 level
3			12,000 to 15,000 cases of fraud to be found	Mandatory treatment for drug addicted OW recipients	Advanced training for caseworkers	Mandatory addiction treatment at all delivery agents by end of 2005
4				10,000 to 16,000 cases of fraud to be found	Mandatory drug treatment	Interactive Voice Response inquiries to handle 40% of social assistance caseload
5				Those convicted of fraud will be permanently ineligible	Increase municipal placement targets from 22.5% to 30% for OW	
6				Review 100,000 cases using consolidated verification process	80% of calls from applicants will be answered within 60 seconds	

Source: Ontario MCSS/MCFCS Business Plans, various years.

It is clear from the summary of material from the business plans that the key measures for welfare services are caseload reduction, and targeting of fraud cases. In addition to this, The Section I heading in 1997/98 suggests that welfare should be used to get people back into the labour force, and Item 2 in 1999/2000 demonstrates a desire to use workfare programs in conjunction with private sector employers. In terms of measures of service delivery, Item 6 in 2001/02 sets a target for call centre service (80% of calls to be answered within 60 seconds). This, however, applies only to calls for applicants, and not for those directed to caseworkers or area offices. Items 1, 2, and 4 of the 2002/03 plan also provide measures of service delivery.

These are the OW municipal placement targets of 30% through work-for welfare initiatives, OW caseloads targets at or below 2001/02 levels, and Interactive Voice Response inquiries to represent 40% of social assistance caseload,

In this part of the business plan, the suspicion that factors that are easy to measure would be given preference is confirmed. An MCFCS official also noted that although the Ministry has set these targets, he does not believe them to be the most appropriate or even the most useful at this time. Instead, he stated that the targets are the just the early stages of the development of a performance measurement system, which he believes will be central to the next phase of restructuring at the MCFCS. It is important to note that individual Ministry Business Plans include a number of additional targets that are not publicly published.

Section II – Key Strategies and Commitments

Table 4: Key Strategies and Commitments Part A

	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03
	Make Community Services Work Better for People in Need of Support	Children's Initiatives that Focus on Child Protection	Implementation of Children's Initiatives	Better Protect Children	Support Children's Healthy Development	Support Children's Healthy Development
1	Ensure better access to children's services	\$10 million in Child care support for OW recipients	Continue new funding formula with CAS	Full implementation of Child and Family Services Act	Implement Early Years Plan for children aged 0-6	Implement Phase II of Early Years Plan by opening the
2	Review and Enhance Services for Children	Integrated child services	New computer system in all 54 CAS offices	100% of cases referred to HB,HC to be followed up with phone call	Early years challenge fund to get support from business and community	75% of families referred to HB HC requiring support referred to community-based HB, HC services
3	New programs for children at risk		\$67 million for HB,HC by 2000-01	\$20 million, 4 point plan for children's mental health services	Revitalize foster care system - recruit more foster families	100% of high risk families receive HB, HC home visiting services
4			\$ 7 million in respite care	2000-01, 490,000 children will receive child care subsidy in some form	\$4.5 million annually for school meal plan	Protect children using of new mandatory risk assessment model
5			Transfer of 5 remaining MCSS young offender facilities to community	Continue tendering process for 5 MCSS YO facilities	Support municipal management and delivery of child care services	Revitalize foster care system -increase number of foster homes by 20% by 2003/04
6						Standardize intake, assessment, outcome tools for Children's Mental Health Services implemented 2002/03
7						Ontario's Promise, Partnership for Children and Youth, to engage and benefit an additional 3 million kids

Source: Ontario MCSS Business Plans, various years.

The second section of the business plans generally deals with children's initiatives.

Within this section, there are six main areas where measures are provided. The second column in Table 4 shows the six major areas (a new area is chosen for the start of every new business cycle). For example, the goal listed for 1997/1998 is to "Make Community Services Work Better for People in Need of Support" but "Children's Initiatives that Focus on Child Protection" is listed for the following year indicating that this topic will increase in prominence. After a year's mandate is listed the Table then provides more specific information showing the various expenditures and programs that will be implemented in order to achieve that particular year's outlined objective. For example, in order to Better Protect Children in 2000/2001 the government implemented a "\$20 million four point plan for children's mental health services." This explanatory information is meant to show exactly how the government plans to accomplish its stipulated objective.

As noted in the previous section, the targets are fairly direct, simple and easily measured. However, the fact that a number of additional measures have been provided in 2002/03 is consistent with the reasoning behind the Ministry name change to MCFCS, where increased effort is now directed toward making Family and Children's Programs more efficient.

Section IV – Key Strategies and Commitments

Table 5: Key Strategies and Commitments Part B

	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03
	Improve Supports to People with Disabilities to Help Live in Communities and Achieve Greater Independence	Continued Implementation of Change to Social Services	Continued Implementation of Change to Social Services	Provide Supports for People with Disabilities	Provide supports for people with disabilities	Provide supports for people with disabilities and vulnerable adults
1		Provide supports to get developmentally handicapped into communities	Create opportunities for developmentally disabled to live in communities	May 2000 announced \$50 million for people with developmental disabilities living in community	\$55 million for increased services and more caregivers	Additional \$49 million for people with developmental disabilities
2		Gather data on repeat young offenders			\$26 million for women's shelters, adding 300 beds, refurbishing 100 more	Additional \$15 million to build new places for people with developmental disabilities
3						Zero tolerance for violence against women announced
4						Continue plan for 300 new and 136 refurbished shelter beds by 2004/05
5						Enhance province wide Assulted Women's Helpline
6						Implementation of joint government / Aboriginal Strategy on behalf of 4 ministries to reduce family violence

Source: Ontario MCSS/MCFCS Business Plans, various years.

The third section of the business plan usually deals with changes to social services and the provision of services to the disabled. Until 2000/01, commitments made in this section remained vague, promising only improvements to existing programs and continued implementation of change. No measures of the success of these commitments were provided. In

2000/01 and 2001/02, commitments becomes slightly more precise, promising more money for programs and, in the latter year, an increase of 300 new beds for women’s shelters. By 2003/03, additional funds have been committed to programs for people with disabilities, and the plans for the 300 new and 136 refurbished beds have been targeted for completion in 2004/05.

Section V – Key Strategies and Commitments

Table 6: Key Strategies and Commitments

	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03
	Build Partnerships with Other Governments to Promote Shared Responsibility	Work with Other Levels of Gov’t, Promote Shared Responsibility	Work with Other Levels of Gov’t	Provide Efficient Service Delivery	Provide Efficient Service Delivery	Provide Efficient Service Delivery Individuals and Families
1	New cost sharing with municipalities	Provincial-municipal services realignment	Work with municipalities to achieve more integrated service delivery at community level	Develop long term policy	Strengthen Governance and Accountability Framework	FRO to complete feasibility study for new integrated service delivery model
2	Negotiate with feds for funding for disabled	Establish homelessness taskforce	Coordinated implementation of homelessness strategy	Governance and Accountability Framework	April 2001, Family Responsibility Office (FRO) to MCSS from Attorney General	Continue project where private collection agencies collect on 30K-40K cases where support payments not made in 6 mths
3		With feds and provs on child welfare issues		Customer service initiatives		Proposed Inter-jurisdictional Support Orders Act to make it easier to obtain support orders outside Ontario
4				Integration of services with municipalities		

Source: Ontario MCSS/MCFCS Business Plans, various years.

The final section generally deals with proposals to work with other levels of government and to provide efficient service delivery. For the first three years identified, only vague commitments are made to work with other levels of government in the provision of services. No

concrete measures are provided. From 2000 to 2002, commitments remain equally vague, but contain some reference to increasing customer service and governmental accountability.

However in 2003/03, specific initiatives are mentioned such as the FRO feasibility study of integrated services and the proposal for an Inter-jurisdictional Act to make it easier to obtain out of province Support Orders (Points 1 and 3, 2002/03).

Generally speaking, for the entirety of the Key Commitments and Strategies section of the business plans, only vague commitments are made. When more precise commitments are provided, they remain superficial targets that are easy to measure, and do not get at the roots of the issues dealt with in MCSS/MCFCS (e.g. poverty). Because of this, the business plan as a tool of accountability is of only marginal use. Furthermore, if this form of the business plan is to drive new policy initiatives, the business planning process could very well undermine the ministry's capacity to meaningfully address the social issues that fall within its mandate.

Core Business

The core business section is intended to outline the central areas of MCSS/MCFCS activity. In every year, the business plan states that the ministry has two core businesses, "income and employment supports" and "social and community services." Within this section, some of the key programs of MCSS/MCFCS are enumerated.

Annual Report on Key Achievements by Focus (Reported in following year's Business Plan)

Table 7: Key Achievements by Focus

	1997/98	1998/99	1999/2000	2000/01	2001/02
	Reform of Social Assistance	Reform of Social Assistance	Reform of Social Assistance	Reform of Social Assistance	Reform of Social Assistance
1	Since 1995, over 250,000 people off welfare	Last year, 14% reduction in OW caseload	Since 1995, over 500,000 people off OW	Since 1995, over 584,000 people off OW	Since 1995, over 600,000 people off OW
2	Last year, caseload reduced by 8%	Since 1996, welfare reform saved approx. \$5 billion	Saved approx. \$8 billion	Average monthly caseload 17.8% lower than previous year	Average monthly caseload 8.8% lower than previous year
3	OW one tier delivery at municipal level	OW participation rates from 50% to 85% by Dec. 1998	OW caseload down by 15.3% from previous year	Training for caseworkers	OW placements increased by more than 30% over previous year
4	Participation rate up from 5% last year to 50% (March 1998)		Over 30,000 OW placements created	New application process for social assistance	Mandatory Literacy Testing and Training implemented across province
5	ODSP Act passed	ODSP employment supports introduced in early 1999	New business process and technology introduced to improve customer service	Increased client services, Interactive Voice Response in all social assistance offices	Mandatory Addiction Treatment Initiative implemented to four sites
6	Fraud: 14,800 cases where benefits terminated or reduced; welfare fraud hotline	Fraud: Report, Nov. 1998: 14,800 cases where benefits terminated or reduced, identified savings of \$100 million		Fraud: 15,680 cases of fraud found	Fraud: 17,734 cases terminated due to fraud/misuse, resulting in savings of \$74.8 million

	1997/98	1998/99	1999/2000	2000/01	2001/02
	Program Reform	Business Transformation Project	Efficient, Effective Service Delivery	Efficient, Effective Service Delivery	Efficient, Effective Service Delivery
1	Reduced social assistance rates	Changes to verify social assistance eligibility in provincial and municipal offices	Transferred management of child care to 47 Consolidated Municipal Services Managers	Customer service improved through Service Delivery Model; new intake process at call centres	Implementation of Service Delivery Model Technology completed across province
2	Tightened eligibility		Creation of Office of Policy and Organization Renewal	Customer service through implementation and monitoring of common service standards	Implementation of new application process for assistance
3	Implementing new technology (6800 new computers in 200 local		Ministry consolidated 12 area offices into 9 regional offices		FRO launched three-year Enhanced Collection Agency Project (ECAP)
	1997/98	1998/99	1999/2000	2000/01	2001/02
	Child Protection & Early Intervention	Child Protection & Early Intervention and Prevention	Child Protection	Protecting Children	Protecting Children
1	CAS to use mandatory risk assessment system	\$170 million for 760 more frontline staff in CAS	Additional \$106 million for CAS	March 2001, Child and Family Services	41 Ontario Early Years Centres opened

	1997/98	1998/99	1999/2000	2000/01	2001/02
	Child Care	Child Care	N/A	N/A	N/A
1	Licensed child care spaces up by approx. 3500	Spending up \$175 million since 1995			

	1997/98	1998/99	1999/2000	2000/01	2001/02
	Supports for People with Disabilities	Supports for People with Disabilities	Supports for People with Disabilities	Supports for People with Disabilities	Supports for People with Disabilities
1	Continued plan to close 3 directly run facilities	256 people from prov. Facilities to community	April 1999 - announced \$35 million for developmentally disabled living in community	May 2000 - announced \$50 million for developmentally disabled living in community	75% of funding provided to more than 260 of lowest paying agencies spent on front-line staff
2	Approx. \$27 million to support community living	\$14 million invested in developmental services in community	Community living created for 978 people with developmental disabilities	\$26 million for homeless shelters	1,435 more people received Special Services home funding
3				Sept. 2000 - announced details of \$10 million for shelters for women and children	385 more received out-of-home respite care
4					220 more people participated in day programs
5					125 people were supported in associate and independent living placements
6					\$5 million in capital funding for 60 new places to live in community
7					Nov. 2001 – announced <i>Homes for Retarded Persons Repeal Act</i> was proclaimed
8					March 2002 – <i>Child and Family Services Act</i> and the <i>Developmental Services Act</i> were amended to limit use of physical restraints

	1997/98	1998/99	1999/2000	2000/01	2001/02
	Creating New Partnerships with Other Levels of Government	Work with Other Levels of Gov't	N/A	N/A	N/A
1	Transfer of funding and cost sharing arrangements for municipal delivery of Social Assistance	Approved 47 Consolidated Municipal Services Managers, reduce # of boards which manage delivery of social assistance			
2		March 1999 announced \$100 million to address homelessness			
3		Improved professional standards for social work			

Source: Ontario MCSS/MCFCS Business Plans, various years.

This key achievements section provides an accounting of what the ministry deems to be its key accomplishments. Because of the newness of the process at the time, no data are available for the 1996/97 in this format. As with the Key Strategies section, achievement in terms of welfare provision is measured in terms of caseload reductions, cost savings, and creation of workfare positions. It should be noted that targets are often exceeded (e.g. in terms of caseload reductions). This however, might be a sign that benchmarks are deliberately set low so as to make achievement easier; however this line of inquiry requires more study. Furthermore, some results are reported in raw numbers rather than percentages or ratios, making the level of achievement difficult to understand and comparison or benchmarking difficult. Most notable are the figures reported for the number of people off welfare “since 1995” and the number of cases terminated due to fraud.

In any regard, the measures themselves do not seem to provide a detailed basis for analyzing the quality of policy. This section also provides a listing of some of the major restructuring initiatives (particularly with regard to implementation of new technologies and downloading) as well as some of the major legislative changes made through MCSS initiative.

CASE STUDY: A CHILDREN’S SOCIAL SERVICE AGENCY

This section of the paper discusses of the implementation of business planning and its effects in the field of Children's Services in the City of Toronto. We use a combination of ministry documents and interviews with selected service providers to attempt to assess the effectiveness of the business planning process at its point of ultimate responsibility - the delivery of services to clients.

Before examining the business planning process in Children's Services under the Conservative government, it is necessary to set the context by examining a series of initiatives in the MCSS undertaken by the previous government, which was in power from 1990 to 1995. Under the previous government, the ministry undertook a major review of children's services in the province which resulted in the publication of a *Policy Framework for Services Funded under the Child and Family Services Act* in May 1993 and a further document *Policy Framework for Services Funded under the Child and Family Services Act: Directions for Implementation* in March 1995. These documents set out six key policy goals:

1. The creation of a cohesive, integrated system of services
2. Easily accessible services (including single points of access for residential services)
3. Local community participation in the planning process
4. Addressing the needs of priority groups
5. Equitable distribution of resources
6. Accountability based on outcomes and benefits

This process had some similarities in its rhetoric to the business planning process adopted by the Conservative government, and also reflected a strong influence of NPM. For example, the 1995 document states "In other words, the ends are set; the ways and means that communities get there can be their own, as long as they are in keeping with the principles and goals of the framework."

The Conservative Government's Reforms of Children's Services

The conservative government's first major initiatives in the field of children's services came in 1997. In April of that year, the ministry published a document entitled "Making Services Work for People: A new Framework for children and for People with Developmental Disabilities." The introduction of the document makes direct reference to the Ministry's business plan and its commitment "over the next two years to establish a new framework for all of the social services that it funds in the province of Ontario", and goes on to state that "our efforts are aimed at ... obtaining the maximum benefit for the public dollars invested."

The first section of the document outlines briefly the past accomplishment of the Province in the provision of social services but states that in the past "no comprehensive vision to guide the growth of social service delivery," existed. The resulting system of services was described as one with "few incentives to contain costs," where "many of our services have been provided in isolation from others," not "making the most efficient use of public dollars." This overall vision is brought to the level of Children's Services with the statement "that [children] should receive better care, not less of it, and they should have access to service providers that are more accountable to those who use their services".

These views are then made actionable in the form of what the Ministry describes as "Four Shifts in Direction," as follows:

From:		To:
Services that respond only to entrenched problems	⇒	Services that anticipate problems, respond earlier and reduce the need for future services
Services organized by agency	⇒	Services organized to respond to the needs of individuals and families
Change through growth in funding	⇒	Change through better service delivery for individuals and families within existing resources
Government responsibility	⇒	Shared responsibilities

In discussing these four “shifts” in more detail, the document places a clear emphasis on the efficiency issues implicit in the Ministry’s choice of these four points of emphasis. The clear implication of the document is that by making these changes, good or better services can be provided at lower cost. For example, in discussing reasons for the shift from an agency based organization of services, the document outlines the difficulties families have navigating their way through the system. It also discusses the duplication of services and functions in the current system (e.g. a child may be assessed several times by different agencies in a short period) and the added expense of duplication of administrative and infrastructure costs at the agency level.

From the discussion of the four shifts, the document moves on to outline “nine overarching goals for reshaping social services in Ontario.” These goals include ensuring that families throughout Ontario have access to a consistent set of “Core Functions”, that those most in need receive support, that those needing support receive it sooner, that services be coordinated and integrated to make them easier to access, that local support systems lower administrative costs and that the services funded by the Ministry lead to reduced reliance on government-funded services. Clearly, several of these goals correspond directly to the key policies outlined in the previous government’s *Directions for Implementation* document, discussed above.

Also echoing the *Directions for Implementation* document is the Ministry's call for "communities to adopt a local and flexible approach," with the Ministry "not focusing on the structure, but on the results." This focus on results entails the use of a "set of indicators to measure outcomes and gauge how effectively public resources are being used," and a move to outcome-based funding for social service agencies. Clearly both documents - *Making Services Work for People* and *Directions for Implementation* - are strongly influenced by the NPM literature.

An important distinction is drawn in *Making Services Work for People* between what are labelled "essential supports" - those that are required by legislation and/or are needed to deal with immediate crises - and "investment supports" - those that reduce or eliminate the need for essential supports in the future. In both cases, the local system of supports *must* provide the supports described. However, the plan contains a "reinvestment strategy," under which spending on investment supports for children under six years of age and those considered to be at high risk must be increased by redirecting funds from other services. These funds are to be acquired by finding more efficient ways to provide services and by "redirecting resources from less effective investment supports to more effective investment supports." The reallocation of spending may occur either within a single agency or across agencies.

Among the more detailed requirements of the *Making Services Work for People* program are that all service providers in a local system use common tools to collect basic information on clients and their families at intake and to assess clients' needs. The document goes on to state that "local systems should not be using resources to develop new tools; rather they should choose among existing tools." Similarly, the program mandates that families should be covered by a single agreement for services, even when they are receiving services from multiple agencies and that where multiple agencies are involved a single person or team is responsible for monitoring the services agreement.

In terms of inputs to the system, the program promises to set a percentage cap on total administration costs of all agencies funded through the Ministry's transfer payments. Currently in 2003, this cap is set at 10% (interview with a Children's Service provider in Toronto, May 2003). Individual agencies will be allowed to go over this cap, but within each local system, any such spending in excess of the cap must be made up elsewhere. One of the Ministry's reasons for setting the cap in this way was to allow agencies to collaborate and share administrative functions more easily. In the experience of one Children's Services agency, the regional offices enforce the cap, but are not supporting or encouraging real integration among agencies to occur (Ibid, May 2003).

The *Making Services Work for People* document concludes with a brief section on monitoring results. It states that "to help ensure accountability ... the Ministry will set and monitor key measures of change". For each measure, a baseline level for each local system will be measured and their local plan will include an analysis of how each indicator will change as the plan is implemented. The performance measures and indicators selected by the Ministry tend to be easily measurable factors that do not necessarily focus on the results achieved for children and families.

The next major milestone in the Ministry's efforts to revamp its children and youth services strategy was the publication of the document *Reinvestment Strategy for Children and Youth*, published in October 1997. This document contains a more detailed discussion of the reinvestment strategy outlined above. It describes nine types of investment supports, which are "known to be effective in preventing or reducing the need for long term or intrusive, expensive supports. Area ministry offices and local planning groups are to choose exclusively from among these supports when allocating reinvestment funds. The report describes these supports in relatively general terms (e.g. home visits by nurses or well trained community volunteers) with a few paragraphs of elaboration on each type of support.

The report also outlines the type of client who should receive these services (i.e. what risk factors are used in identifying clients in need of preventative support or early intervention) and six key features required to make the system successful (e.g. that the system be holistic, that it be tailored to the needs of the local community etc.). In the case of each of these three lists each item is backed by a list of bibliographic references supporting its inclusion. The document contains an extensive bibliography, totalling 126 items in all.

Reinvestment Strategy for Children and Youth also contains a section dealing exclusively with the need for local systems to develop a plan to support the reinvestment initiatives it undertakes and to make this plan in conjunction with other agencies working in the field (e.g. education, health, municipal and federal government agencies, and not for profit agencies). The planning process is to be built around two key activities - conducting an environmental scan (focussing on risk assessment and capacity assessment) and identifying local reinvestment priorities. The planning process is to be guided by the following four principles:

1. Build on existing resources
2. Invest strategically
3. Focus on designated groups
4. Allow time for development.

Implementing the Policy Changes in Toronto

Based upon the guidelines given in *Making Services Work for People* and *Reinvestment Strategy* each regional office of the Ministry was to oversee the development of a local services plan. In the City of Toronto this plan was outlined in *To Serve the Children: A Handbook for Children's Services in Toronto*, published in February 2000. This document ties directly back to

the policy framework outlined in *Making Services Work for People* making direct reference to the nine goals and six required features. The Toronto plan achieves these goals through 22 strategic directions, which were outlined originally in *A Plan For Toronto*, approved by the Ministry's Toronto regional office in February of 1998.

The first step in the plan was to divide Toronto into four quadrants (based on the former municipal borders within Metropolitan Toronto), because it was decided that the entire city contained too large a population for services to be managed on a citywide basis. Within each quadrant, a Children's Services Network (CSN) was established, made up, at a minimum, of all MCSS funded providers in the quadrant. Each CSN has three primary functions: service coordination, service resolution and service systems planning.

The service resolution function of the CSN is worthy of particular note. The resolution function was meant to coordinate particularly difficult situations which could not be resolved through the usual service coordination process, to "brainstorm and consult" to develop service coordination plans in specific cases and to identify gaps and other issues affecting the ability of the CSN to deliver needed services. This function was expected to diminish as the service coordination function developed. However, to date, this has not occurred (interview with a Children's Service provider in Toronto, May 2003).

It is also important to note that the CSN were seen as being part of a set of "overlapping networks" of service providers. A single family or individual may receive services from members of more than one system of services (more than one network) and particular agencies may be members of more than one service delivery system (e.g., providing services to children and to adults with learning disabilities).

A key theme of *To Serve Children* is service coordination. It spells out through flow charts the detailed protocol to be used to ensure that the services provided in a particular case are coordinated. A key role in achieving this goal is played by a service coordinator, which is an

agency assuming the coordination function for a particular client. The service coordinator works with the family and all service providers involved in the case to ensure that a service plan has been developed and captured in a Service Provision Summary (SPS), which is clearly understood and accepted by the family and all service providers. The service coordinator monitors the implementation of the SPS and makes changes as needed. This monitoring function includes the facilitation of needed evaluations. A service coordinator is to be assigned and in contact with the family within two days of initial contact and a face-to-face meeting between the family and service coordinator is to occur within five days in urgent cases. To facilitate this coordination function, each member of a CSN is to adopt common assessment tools and common record keeping and consent procedures.

Another feature of the Toronto area plan was a system known as Centralized Access to Residential Services (CARS). This system ensures that access to residential beds, which are expensive and in relatively short supply, is made on a centralized basis. A CARS committee receives placement requests from service providers on the initiative of service coordinators. The CARS committee then matches requests to available beds. Once a client is admitted to a residential placement, the residential service provider becomes a member of the service coordination team. The service coordinator, who heads this team, is responsible for planning the client's reintegration into the community.

From an NPM/Business Planning perspective, a major component of the *Framework to Serve The Children* is a description of the documents to be used as a coordinating mechanism with the four CSNs. Key among these is the Service Inquiry Record (SIR), used to record initial information from new clients, and the SPS, described above.

The SIR is the mechanism used to ensure that the intake and assessments processes are standardized within the Toronto Area. Its key roles are to provide an ongoing record of basic client information and serve as a depository of client information for use in making referrals to

other agencies. The SPS records the goals of the client, the strategies adopted to achieve those goals and each service providers' responsibilities in achieving those goals as well as any commitments made by the individual client or family.

The Impact of the Changes at the Agency Level

In this section we assess the implications of the NPM/Business Planning framework from the perspective of a small, children's services agency located in Toronto. The agency is a relatively small provider of children's services with an annual budget of less than \$5 million. The agency provides a mixture of essential and investment supports, with an emphasis on investment supports (the area of increased funding).

In general, the agency expressed mixed views with respect to the recommendations of *Making Services Work for People*. In fact, it had previously actively promoted several of the policies recommended in the report, such as coordinating information across agencies (implemented through the SIR and SPS). However, the agency expressed concern over many of the policy recommendations at the time of the report's release. These concerns were in many cases based on the lack of specifics in the Report and a perspective that the Ministry's Toronto Area Office lacked a clear vision. For example, the policy of reducing access points could be one which the agency would support if it was implemented in a way which encouraged collaboration among existing agencies or one which the Agency would strongly oppose if it involved the creation of a new "Super Agency". The implementation of the policy is left to the regional offices. The Agency noted in at least one region, the MCFCS forced compliance to this policy by creating a Super Agency without the regional office and its agencies' support. At the same time however, the Agency is concerned by this lack of uniformity in applying policy directives across regions with respect to funding. Similar concerns exist over the common service agreement policy and coordination of assessments.

Overall, the agency expressed serious concerns with respect to a number of issues. First, the agency's staff knows of no one in either field - service provider or client - who supports the linking of children's services with those for the developmentally handicapped. As a result, this aspect of the framework has yet to be implemented (interview with a Children's Service provider in Toronto, May 2003). Next, the agency notes that the *Making Services Work for People* document and those implementing it provide no indication that the "chronic under funding" of children's mental health services in the province will be reversed. Finally, the agency contends that *Making Services Work for People* makes no provision to ensure that a "fair open and equitable process" is used to make trade offs among the competing needs of various clients (a significant omission if one accepts the contention that the system is significantly under funded). Rather, the agency noted that funding seems to be provided on the basis of the previous budget. As such, the Agency believes that those most "in need" of assistance are not receiving it. In addition, the Agency states that changes in the welfare reform and Children's Aid are resulting in additional issues, beyond the scope of the Agency's mandate, being passed on to it. This is a significant problem, in that it further reduces the resources available for direct services.

As the ministry and the Toronto regional office have worked to implement the policies outlined in *Making Services Work for People*, the agency has continued to support several of the major initiatives. For example, the regional office has adopted a common telephone screening questionnaire - the Brief Child and Family Placement Interview (BCFPI), to collect pre-admission information from clients in order to perform a sort of triage, identifying clients with the greatest needs. The agency describes itself as a champion of the BCFPI and was clearly happy with the decision to adopt it area-wide.

Similarly, the agency was pleased with the way access to the system has been rationalized in Toronto. In some regions of the province, a single access agency for children's services was created. However, in Toronto the agencies providing services themselves

developed an alternative, collaborative plan whereby a call by a client to any participating agency would guarantee access to whichever agencies were appropriate to the client's needs. This was achieved by a region-wide commitment by service agencies to assist by creating a SIR and accepting responsibility for the client until such time as the client was placed with an agency.

A weakness in the adoption of the *Making Services Work for People* framework, cited by our subject agency, is a lack of accountability for outcomes. While instruments like the BCFPI and CAFAS are used to measure client needs, there has been no systematic attempt to measure an agencies' ability to achieve positive client outcomes or to tie funding to such outcomes.

The regional office does require that the agency administer a survey entitled "Let Us Know How We Are Doing" to parents, but this is carried out only during the early planning part of a client interaction and no follow up tool is used to assess performance later on in the process when services are actually being provided to the client. It is also worth noting that although the Ministry has identified specific service requirements (e.g., that Service Coordinator contact clients within two days of initial contact) the Ministry has yet to ensure that such requirements are being met by the agency.

Our subject agency's biggest concern about the implementation of *Making Services Work for People*, however, is clearly - and probably not surprisingly - the lack of funding increases to support the Ministry's new initiatives. The agency has seen its funding increase just 1% from 1991/1992 to 2002/2003, while the CPI has increased 18.28% and the salaries the agency pays its workers have increased 15.5%. Furthermore, the increased focus and shift of spending in Children's Services, as seen in the Business Plans over the years, has trickled down to the agency, even though has registered to participate in new programs such as Ontario's Promise which have been expanded to serve an additional 3 million children in 2002/03 (Section II of

Key Strategies and Commitments). Agency administration believe that funding is not based on services provided to need ratios, but rather is based primarily on the previous year's budget.

The result of all this has been a reduction in programs at the agency, the creation of a wage differential of about 30% between the wages the agency pays and those paid by similar agencies and a very high staff turnover rate at the agency of more than 30% annually. Against this background, the agency has had to assume all of the costs of meeting the new requirements placed upon it by the *Making Services Work for People* framework. For example, the Agency has made considerable investments in computing and tracking systems for the benefit of the MCFCS, but currently does not itself benefit from the information; as a result this represents a direct reduction in funds available for provision of direct services.

As a final note, our agency saw little connection between what was going on in their own corner of the Ministry's work and the overall business plan of the Ministry. The agency was not consulted in the development of the business plan. Moreover, the Agency is unaware of the process used by its regional office to review requests for funding at higher government levels, or how the regional office represents agencies and clients' needs within the MCFCS.

Conclusion

The introduction of New Public Management represents an important innovation in public sector administration. NPM has been widely introduced in both developing as well as developed nations. However, NPM has a number of detractors. Some argue that the growing desire to replicate business is in fact misguided. The state was forced to enter into many complicated policy fields because the private sector was incapable or unwilling to fulfill the public demand. This may have been a result of having inadequate resources, or it could simply have meant that the services required were unprofitable and therefore ignored by private industry. It has also been asserted that those in the private sector look at the state as an inferior

entity, and consequently are only going to find negative qualities when examining it. “A businessperson’s approach by nature, is suspicious of governmental machinery; hence, a businessperson’s approach is always going to be biased” (Dwivedi, 1988, p.98)

As we already know there are many others who disagree with the above statement and feel that if market mechanisms were established in traditional non-competitive environments that government’s efficiency would be greatly improved.

The province of Ontario has been a strong supporter of the New Public Management. One attempt to introduce NPM technologies into the public service has been the development and implementation of business planning. The term business planning is interesting due to its private sector connotations. In fact, there has been a deliberate attempt to utilize private sector business terminology.

One major innovation in the business planning process has been an attempt to communicate the business plan to the general public, in addition to stakeholders and client groups. All of the government’s business plans are available on the Internet. However, it is apparent that the government maintains two sets of business plans. The business plans provided to the general public are at a high level of abstraction and do not address the risk management issues that appear to be contained in the unpublished government business plans. The inability of the public and service providers to access this information leaves a certain level of transparency and accountability to be desired.

In this paper we have demonstrated the application of NPM techniques, and business planning, in the social services portfolio. It must be noted that the introduction of business planning is closely related to the government’s commitment to expenditure constraint. Therefore, it is difficult to determine government priorities. That is, is the prime objective budget constraint or the introduction of modern managerial techniques? In fairness, the government would argue that modern management techniques have permitted expenditures constraints with little or no

impact on the provision of services. The Conservative government was successful in its attempt to constrain public expenditures.

This paper attempted to assess business planning by examining its affect on a small children's social services agency located in downtown Toronto. The agency feels positively about many of the changes that have been implemented. The move to integrated services appears to have resulted in significant benefits for its clients. An integral component behind the improvements has been the better collection of information, the better use of information technologies, and better forms of management.

The agency notes, however an incomplete linkage between ministry business planning and agency activities. The feedback loop is incomplete. Linkages between plan, measurement and resource re-allocation have not occurred, or at least are not fully formed.

Therefore, one must view the introduction of the New Public Management and business planning as an interesting experiment which will require ongoing evaluation in order to fully assess ultimate utility.

About the Authors:

Tom Wesson is Associate Professor of Strategic Management at the Schulich School of Business, York University. Professor Wesson received his Bachelor of Commerce from Queen's University and his Master of Business Administration and Ph.D. in Business Economics from Harvard University. His research focuses on issues of international business strategy and government policies toward business in such areas as international competitiveness and corporate governance. In this latter area, he has focussed on the effects of the Canada-USA Free trade agreement and NAFTA on Canadian business and on the effects of foreign direct investment on firm competitiveness. Recently he has undertaken, with David Barrows, a series of studies investigating the applicability of private sector strategic management tools to public sector organizations.

David Barrows is a senior executive with extensive experience in public administration, education and training, business-government relations and economic analysis. He is a professor in the Schulich School of Business, and Associate Director of the Master of Public Administration Program.

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