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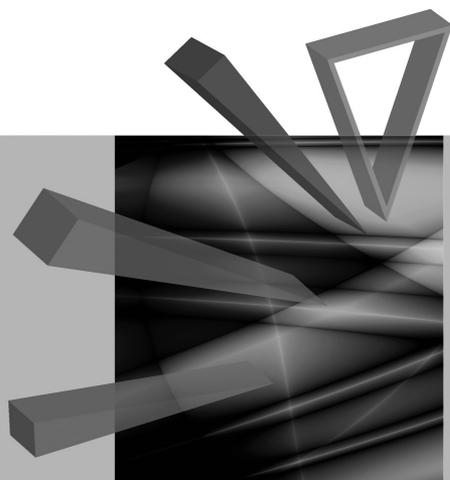
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Planning and Evaluation Aspects



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Ryszard Brol

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THEORY AND PRACTICE OF LOCAL DEVELOPMENT STRATEGIC PLANNING

Summary: The initial part of the presentation includes the definitions of the core and scope of strategic planning at local level, functions of strategic planning in small towns, principles of designing local development strategies, as well as a proposal for applying a four-stage procedure of strategic planning within the formula of collaborative planning. The other part discusses the course of designing the local development strategies in ten small and three medium-sized Polish towns. This comprises of a presentation of motives that prompted the implementation of strategic planning procedures, an evaluation of compliance with the consensus principle and the sustainable development standards, an evaluation of the applied strategic analysis, and finally an evaluation of the procedure for identifying the hierarchical structure of strategic objectives and goals.

Keywords: local development, town development strategy, strategic planning, strategic objectives, strategic analysis, collaborative planning, sustainable development.

1. Theory

The concept of *development strategy* as applied in organisation and management theory, cybernetics and economics is construed – at its most synthetic – to be a policy for setting objectives. Strategy is, therefore, a concept referring to the sphere of development policy, while tactics refers to development management.

The concept of *strategic planning*, widely recognised in the theories of area planning, involves both the policy of setting the development objectives and the procedures and instruments for development management [Brol 1998; Klasik 1996; Ziółkowski 1998]. The outcome of strategic planning at the *gmina* (i.e. lowest administrative) level is a strategic plan for local development, in practice referred to as a *local development strategy*. Such a strategy is then a long-term plan for the development of a town (*gmina*) that specifies a vision of development, strategic objectives of development, operational objectives, strategic goals and the methods of implementing and monitoring them. The object of the so-defined local development strategy is the local community, which – on the one hand – collaborates in the setting and implementation of the strategic tasks through their socio-economic activity, and

– on the other hand – becomes the beneficiary of both, the external benefit package emerging due to the local development that improves the conditions for economic activity in the town, and the package of town utility values that determine the quality of life. The subject of the strategy is the local, municipal reality in its eco-spatial, economic and social aspects.

Depending of the town's scale and spatial structure, its demographic potential and the scale and structure of exogenic and endogenic activities, the functions, the principles and procedures of strategic planning may be defined in different ways. The scale of a small town allows – to a larger extent than that of a city – the identification and measurement of endogenic potential through a direct survey, and also guarantees a wider base of community collaboration in determining the strategic objectives and goals and in monitoring their implementation. This, in turn, allows the identification of the functions and principles of strategic planning characteristic for small towns, as well as determining the procedures for designing local development strategies for small towns.

A characteristic feature of small towns is the significant shortage of resources to finance their development. In such a situation, a significant function of a strategic plan for local development is the selection of development priorities as well as the selection of methods and instruments of the local economic, social and spatial development policies to implement the selected priorities. The priority selection process is based on the economic, social and eco-spatial criteria. The basic economic criterion of selection is securing a small town's competitiveness in relation to its translocal environment through sustaining the existing enterprises and attracting new ones. The basic determinants of a town's economic competitiveness are its scale and the structure and quality of the external benefits offered by the town to local enterprises and potential investors. The social criterion of selection refers to securing an adequate level of utility values, i.e. the conditions offered to the local community that determine the quality of life in a small town.

An equally important function of strategic planning in a small town is the rationalisation of the decisions taken on a day-to-day basis by the local authorities. The determination of the strategic objectives of development, as well as working out a scenario for their realisation, prevents the town's development from indirectly resulting from short-sighted, tenorial and frequently ineffective everyday decisions. A local development strategy, adopted by way of a resolution of the town council, enforces the targeting of the current decisions concerning the economy, society and spatial management at reaching the long-term objectives of town's development.

Another function of strategic planning at local level is predicting potential *critical moments* in the town's development and implementing efficient alleviation measures. The development of a town is a process of transforming its functional structure and spatial arrangement, as well as changing the relations between the succession of the town's functions and the efficiency of the town's management. Breaking the existing harmony of the town's exogenic and endogenic functions and

of the relations between the town's functional needs and its infrastructural capacity brings about a crisis situation – i.e. a *critical moment* in the town's development. An *ex ante* identification of threats resulting from a potential *critical moment*, as well as their liquidation or alleviation, are possible if the current management of town is subservient to the local development strategy.

The procedure of designing a town development strategy should be based on the following principles:

- principle of collaboration of the local community,
- principle of consensus,
- principle of keeping the strategy open in its exogenic aspect,
- principle of eco-development,
- principle of coherence between individual planning documents.

Maintaining the first of the above principles requires the collaboration of representatives of the local community in the work on strategy design. The representatives should come from various circles and interest groups. This is necessary because the town development strategy is to propose the – acceptable to the local community – forms, measures and instruments to define mutual relations between the local economic entities in their endeavours for municipal development. Additionally, the strategic development plan is to stimulate coherence or complementarity between the sectoral measures and the area-oriented measures applied by local authorities. A method securing the wide collaboration of the local community in the work on designing a town development strategy is the formula of *collaborative planning* that involves procedures of collaborative planning and collaborative decision-making, exercised by representatives of all the stakeholder groups.

According to the consensus principle, in situations of dispute between the parties collaborating under the collaborative planning procedure, the objective is to arrive – through discussions and reasoning – at a solution better than a mechanical compromise. The final outcome of the work of *collaborative planning* participants should be a new, innovative solution – a less obvious, but better than the one proposed by the *collaborative planning* participants at the commencement of the works. The consensus principle excludes the possibility of voting, which would divide the participants into winners and losers.

The principle of keeping the town development strategy open to the environment, requires such a formulation of strategic objectives and goals where a significant majority of the effects of their implementation would exceed the scale of the town and the surrounding *gmina*. Such an excess proves the appearance of the exogenic functions of the town – defined in specialist literature as urbanising functions. The town's scale, structure and spatial range, on the one hand, determine its specialisation in the regional and national settlement network, and on the other – by increasing the effective demand (above the local one) for the outputs of local enterprises – they determine the income level of those enterprises and consequently the incomes of the local community and municipal budget.

According to the eco-development principle, a local development strategy should define the strategic objectives and goals to stimulate the town's socio-economic development to follow a course that would not curb environmental resources. Eco-development is a specific philosophy of development – a paradigm of sustainable development – where the level of economic use of environmental resources is determined by the capacity of keeping them in a condition to guarantee ecological safety for present and future generations. Sustainable development cannot be considered identical to ecology or environment protection in its strict sense. In the practice of strategic planning at local level, keeping the eco-development principle comes down to integrating the three aspects of sustainability: eco-spatial, social, and economic. Firstly, this means that according to the eco-development principle, economic activity carried out in an area of high natural value cannot pose a significant threat to the local ecosystem. If this is the case, the local development strategy must guarantee the harmonisation of current and prospective nature-related values and benefits with the socio-economic ones. Secondly, the principle states that it is just those natural values and benefits that should be significant determinants of the local development. This means that the full utilisation of the natural characteristics and values of the local ecosystem should make a basic criterion in selecting the strategic objectives and goals included in a town's development strategy .

Gmina is a component of the system of public administration in Poland. Within the system, other administrative units also prepare development strategies and the resultant programmes of an operational nature. The coherence principle enforces cohesion between the provisions of local development strategy and the planning documents drawn up at the levels of district, region, state and European Union. In particular, the strategy must be coherent with the following documents: regional development strategy, provincial plan of area management, provincial programme for sustainable development and environment protection, operational programme for regional development, national development programme, basis for community support, and other planning documents made in accordance with the programming principle of the European policy for regional development. Maintaining the principle of planning documents' compatibility is a prerequisite of the town's (*gmina's*) inclusion in the regional, national and European development programmes.

The above-discussed definition of strategic planning of the urban network, the functions of strategic planning and the principles of designing a local development strategy to a large extent determine the organisation and procedure of preparing that planning document. As shown in Figure1, the procedure of designing a local development strategy for a town (*gmina*) can be divided into four stages. The objective of the first of them is getting various circles of the local community interested in collaboration in defining the developmental perspective of their town, as well as in the creation of an institutional framework to enable applying the formula of collaborative planning. The presented procedure of designing a local development strategy requires the integration of professional and methodological

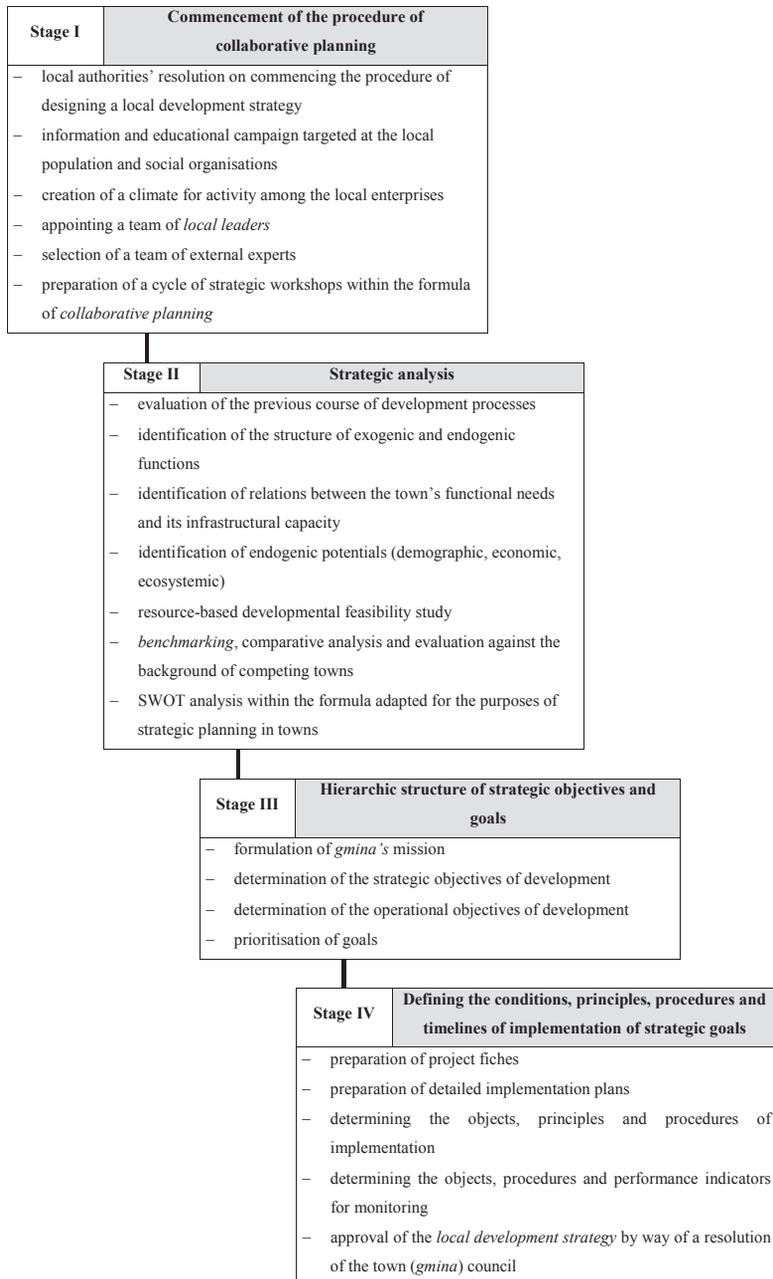


Figure 1. Procedure of designing a local development strategy

Source: own elaboration.

skills of an interdisciplinary team of experts as well as the practical experience of the local community, as represented by so-called *local leaders*. A characteristic of the planning process carried out in small towns – as opposed to cities – is the greater possibility of achieving wider community collaboration in the process of strategy designing, which in turn guarantees the better correspondence of the strategy to the local realities and secures wider social support for its implementation.

The second stage of the discussed procedure of planning the development of a small town involves:

- direct surveys, resulting in the preparation of a so-called *prospective diagnosis* that constitutes an attempt at forecasting the town's future on the basis of an analysis of its visible developmental tendencies and the results obtained in the resource-based developmental feasibility study;
- identification and measurement (in a direct survey) of the town's endogenic and exogenic functions as well as the determination of relations between the town's functional needs and its infrastructural capacity;
- comparative analysis, with a competing town set as a *benchmark*, involving the selection of the benchmark town, selection of characteristics to be analysed, and determining the road to reaching the benchmark town level;
- SWOT analysis, conducted on the basis of an algorithm extended by new elements that do not occur in a standard SWOT procedure [Brol, Sztando 2002]; such an analysis should combine the sources of information and assessments obtained in a direct survey with the procedures of collaborative planning.

The objective of the third stage of the procedure in question is building a hierarchical structure of strategic objectives and goals. At this stage, it is extremely important to keep the basic principle of *collaborative planning*, i.e. the principle of reaching a social consensus in the identification of strategic and operational objectives and strategic goals and in determining their sequence and interdependencies.

The final stage of building a local development strategy consists in preparing action plans for strategic goals. Each identified strategic goal is provided with a preliminary project fiche in the form of a so-called *project fiche for a strategic goal*. The fiches include project description, definition of project objectives and of their position in the context of strategic and operational objectives included in the local development strategy, and of other planning documents, e.g. the regional development strategy. An important component of works conducted at this stage of strategy design is the preparation and approval – under the collaborative planning procedure – of the concept and timeline of strategy management, i.e. the determination of objects, principles and procedures to be applied in the implementation and monitoring processes.

2. Practice

The procedure of designing a local development strategy, as presented above, found its practical application – with the author’s involvement – in the strategic planning conducted in the following ten small towns: Lubawka, Nowogrodzic, Polkowice, Wronki, Łądek Zdrój, Złotoryja, Świerzawa, Wojcieszów, Szklarska Poręba and Bolków, as well as in three medium-sized towns: Starachowice, Dzierżoniów and Jelenia Góra. Each of these towns had a different motivation for preparing a strategic development plan.

The community of Lubawka was seeking a source of financing for its development measures aimed at enlivening the local economy in order to decrease the local unemployment rate. That is why, in 1993, it joined the PHARE Local Initiatives Programme. The prerequisite of admission into the programme was the adoption of a local development strategy for the town and *gmina*. Lubawka took this opportunity and won the competition and the prize of about EUR 650,000 to finance the five key strategic goals included in the development strategy.

The *gmina* of Nowogrodzic started work on designing a local development strategy (1996) because the local authorities believed it possible to gain a location premium thanks to its location near the border and the route of the A-4 motorway. The local development strategy assumed using the location advantage and it stimulated adequate infrastructure development and the efficient promotion of the *gmina*’s economic assets. Some of the strategic tasks were carried out during the five-year period of the strategy’s implementation. The 2001 review of the strategy resulted in setting new strategic goals, based again on the favourable location.

Thanks to its huge copper deposits, the *gmina* of Polkowice is among the richest in Poland. When in 1995 the local authorities decided to start the procedure of strategic planning and then in 2001 reviewed it, they expected the strategy to provide an answer to the question of how to use the current revenues in order to transform the “mining monoculture” into a multi-functional structure. The activity of the local community of Polkowice was a great example of the active prevention of *critical moments* in the town’s development. In this case, the function of development strategy was to identify the hazards resulting from the monolithic character of the local economy and indicating a scenario to alleviate their impact.

Starachowice, Dzierżoniów and Jelenia Góra experienced quite the opposite situation. The local development strategies devised for Starachowice and Dzierżoniów were meant to indicate a method for alleviating the effects of the already existing *critical moment* in their development, caused by the liquidation – enforced by the administrative and economic transformations at the national scale – of large but unprofitable companies or a drastic decrease in their output and workforce size. In the case of Jelenia Góra, the critical situation was caused by losing the status of provincial centre and the closure of a large military base. In this case, the town development strategy, revised in 2004, was to provide guidelines for developing

other exogenic functions of the town, which could be based on the intellectual and material potential left over after the abandonment of some municipal functions.

An aftermath of the administrative and economic transformations in Poland were the changes taking place in small towns – tourist and spa centres – like Łądek Zdrój or Szklarska Poręba. Due to the restructuring, commercialisation and privatisation of large public companies, these towns saw the closure of large holiday homes and spa centres owned either by those companies or by the Workers' Holiday Fund. The situation of Łądek Zdrój was made still more complicated by the closure of a spa complex formerly used by Soviet Army troops stationed in Poland and the neighbouring countries. As the towns lost the major entities providing tourist and spa services, it seemed necessary to define some development strategies for Łądek Zdrój and Szklarska Poręba in their new situation and in the changed conditions for tourist and spa industries.

The other towns whose practices of strategic planning are covered here, i.e. Wronki, Złotoryja, Świerzawa, Wojcieszów and Bolków, decided to devise their development strategies for two major reasons. One was the necessity to invigorate the sector of SMEs of various profiles, who were to replace the liquidated state companies of the manufacturing and agricultural sectors in the labour market. The other reason was that the towns had to meet the formal prerequisites in applying for financing the local projects from the pre-accession funds (Wronki, Złotoryja) and – primarily – of placing the projects within the context of an operational programme for regional development.

At the initial stage of the collaborative planning procedure, all the towns in question either appointed teams of *local leaders*, composed of local celebrities and representatives of the local community – selected on the basis of the criteria of residence, occupation and age – or had the existing associations or foundations for local development involved in designing the strategy. These institutions – beside the local authorities – became the key actors in the process of designing the strategy, and later in monitoring its implementation. One of the organisations – the Lubawska Gate Foundation – was a direct beneficiary of the financial resources granted under the PHARE Local Initiatives Programme to finance the realisation of strategic goals. Observations on the level of the involvement of the local community in the procedures of strategic planning carried out in the towns in question – measured as the rate of persons expressing any interest in the strategy under preparation (e.g. questionnaire return rate in community surveys) in the total population, the attendance at meetings and consultations organised by the experts, and the active expression of opinions – show that the involvement rate largely depends on the town's size. The most actively involved in local affairs were the members of the smallest communities. In the small towns (*gminas*), the opinions given by residents within the *collaborative planning* were varied and depended on their place of residence, age, education, social status and occupation. In such a situation, consensus is sought exclusively at local level. The situation was much different in the larger towns (e.g. Starachowice or Jelenia Góra),

where the residents' awareness of the strategic planning being underway and their involvement in the *collaborative planning* process were far more modest. In these towns, the opinions of *local leaders* – as expressed during the so-called strategic workshops in the presented standpoints, assessments and conclusions – depended to a far larger extent on their political opinions. Therefore, the search for consensus on local affairs had an additional, political aspect of a translocal nature. This observation was further confirmed during the town council's voting on a resolution approving the local development strategy.

At the second stage of the strategic planning process, none of the towns carried out a full strategic analysis involving all the seven studies presented in Figure 1. In most towns, the strategic analysis involved the preparation of a prospective diagnosis – including a description and evaluation of the previous course of socio-economic development – and an environmental assessment report. The local development strategies adopted by the local authorities of Jelenia Góra, Starachowice, Dzierżonów, Łądek Zdrój, Wronki, Nowogrodziec and Polkowice were based on a prospective diagnosis extended by the results of a SWOT analysis carried out during the strategic workshops in its standard business formula of identifying the strengths and weaknesses of the object in question, as well as its developmental opportunities and threats. The strategic analysis performed in the smallest towns listed here – Wojcieszów, Bolków and Świerzawa – involved an extended SWOT analysis based on the results obtained in direct surveys of the town's social, economic and eco-spatial spheres, as well as on residents' opinions given in surveys and during the strategic workshops.

Most of the discussed local development strategies – except the one for Szklarska Poręba – are compliant with the sustainable development principle. A consequence of the too strict adherence to that principle is the identification of strategic objectives separately for all the three aspects of sustainability – social, economic and eco-spatial. In all the discussed cases, the objectives are defined in the form of more or less elaborate clauses, but appear to be identical as to their merits. In the economic aspect, the objective is reaching a high level of economic development, in the social one – reaching a high standard of the quality of life (employment, housing and municipal services), in the eco-spatial one – sustaining the effects of socio-economic development within the eco-development. The element that differentiates the discussed local development strategies is the difference in the identified operational objectives and strategic goals, as they depend on the results of the strategic analysis which identifies town-specific problems. Therefore, one can say that the identification of operational objectives and strategic goals, and defining their hierarchy and implementation timeline, is the main result of the strategic planning procedures carried out in the towns in question.

In Szklarska Poręba, the identified strategic objectives of the town's development directly and clearly point to the development of tourist services – especially the skiing infrastructure – also within the protected area of the Karkonosze National

Park. The development strategy for Szklarska Poręba is a document, that by setting a scenario for the town's development, is also intended to justify the "battle for space" fought by the local authorities and tourist service providers against the Karkonosze National Park.

The discussed planning documents differ significantly as far as the implementation of Stage 4 of the procedure for designing a local development strategy – as proposed above – is concerned. Here, the diversification is based on the period when the strategy was prepared. The local development strategies prepared in the 1993–1999 period for Lubawka, Nowogrodzic, Polkowice, Łądek Zdrój, Dzierżoniów, Starachowice, Wronki, Złotoryja and Szklarska Poręba include documents similar in content to *project fiches for strategic goals* and also detailed action plans for strategic goals to be implemented during the current term of office of the local authorities. Apart from the basic information included in the project fiches, each of these action plans contains a project management plan, implementation timeline, project budget, socioeconomic calculus, an opinion on the project's potential impact on the local ecosystem and a simulation model of the town's functioning post project implementation. The strategies prepared during that period did not propose a procedure for monitoring the progress towards operational objectives, and consequently did not identify project performance indicators.

The local development strategies prepared in the later, 2001–2010 period, for Bolków, Świerzawa, Wojcieszów and Jelenia Góra, as well as the then reviewed versions of strategies for Lubawka, Polkowice and Nowogrodzic, contain neither *project fiches* nor action plans for individual strategic goals. On the other hand, these documents include detailed descriptions of the procedures for implementing the whole strategy. The descriptions define the implementing authorities, their competencies, implementation procedures and timelines, and a set of performance criteria for operational objectives as well as the methodology for applying them. An extension of the part devoted to the specification of principles, conditions and procedures for implementing and monitoring the performance of strategic goals is a result of the obligation – resulting from Poland's EU accession – to prepare the planning documents in accordance with the principle of cohesion of the planning documents prepared at various administrative levels, as applied in European regional development policy.

The presented examples of the strategic planning practices applied in 14 small and medium-sized Polish towns clearly indicate that the procedures used in designing local development strategies, although following the same four-stage pattern, differ significantly from one another, depending on the size of the town (*gmina*), the period of their preparation, scope of the strategic analysis and – primarily – the town's characteristics that determine the local authorities' motivation in embarking upon the procedure for defining a local development strategy.

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TEORIA I PRAKTYKA PLANOWANIA STRATEGICZNEGO ROZWOJU LOKALNEGO

Streszczenie: W publikacji przedstawione zostały definicje odnoszące się do istoty oraz zakresu merytorycznego planowania strategicznego na szczeblu lokalnym; funkcje planowania strategicznego w gminach, zasady konstruowania strategii rozwoju lokalnego, a także propozycja zastosowania czteroetapowej procedury planowania strategicznego w formule planowania partycypacyjnego. Publikacja zawiera również relację oraz ocenę dotyczącą przebiegu formułowania strategii rozwoju lokalnego w wybranych gminach. Relacja ta obejmuje: przedstawienie motywów, które zdecydowały o wszczęciu procedury planowania strategicznego, ocenę respektowania zasady konsensusu oraz zasady ekorozwoju, ocenę stosowanej w praktyce analizy strategicznej, a także ocenę procedury identyfikacji hierarchicznej struktury celów i zadań strategicznych.

Słowa kluczowe: rozwój lokalny, strategia rozwoju miasta, planowanie strategiczne, cele strategiczne, analizy strategiczne, planowanie partycypacyjne, rozwój zrównoważony.