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FINANCE TEAM

CORAL SPRINGS, FLORIDA

Coral Springs' Budget Department Explains Its Three Pillars of Sustainability

BY KATIE LUDWIG



For the city of Coral Springs, Florida, sustainability has three pillars: financial, organizational, and environmental.

"That's how we view sustainability and why we brought the Office of Sustainability under the umbrella of the budget department," said Ileana Petrone, the city's director of Budget and Sustainability.

Petrone and her team in the Department of Budget and Sustainability (DBS) cite the city's

collaborative culture as one of the reasons for the city's success in building up these three pillars. An example is its motto—"One Team, One Mission"—which was developed at the beginning of the COVID-19 pandemic. All messages that went out to employees included the motto, and it helped keep those working remotely and those who were not able to do so focused on what they needed to be doing to serve the public in the midst of significant uncertainty. "We were still 'One Team, One Mission,' just trying to get through the pandemic, keep up our services, and do everything that we said in our strategic plan," Petrone said.

The city manager's weekly communications to staff still include the motto, which is "a big part of who we are as a city," she added.

Petrone went on to explain that the city's vision is to be "the premier community in which to live, work, and raise a family." While discussing this vision statement with the city

commission, in preparation for adopting it with the city's strategic plan in FY 2022, senior staff talked about what it means to be "premier." These conversations helped build collaboration among the senior staff. "We are the ones who are bringing a budget to the city manager and ultimately to the commission, but if it's always heavy on one department and not another, and we end up in a situation where we have facilities that don't have money—that means we're not meeting our vision," she said. "If we need money for our parks to take care of a facility, but we've never given the money to take care of these facilities, are we really a premier community?"

Nicole Giordano is the city's performance management manager. She oversees the management and tracking of the city's strategic plan and its business plan, working with the departments to establish their goals for the year and helping them with tracking their key performance indicators

(KPIs). The city shares this information with the public through its community dashboard, which is updated quarterly.

Giordano explained how the city's motto and vision work together. "The 'One Team, One Mission' organizing principle identifies how we're going to get it done—we're going to get it done together, and our vision is really why we're doing it," she said. "We want to get it done because we want to be the premier community in which to live, work, and raise a family."

Laurie Bishara, assistant director of Budget and Sustainability, emphasized the importance of collaborating to define "premier." "We really needed to define that goal because premier meant something different to the different departments," she said. "When we got together during strategic planning and really defined what premier meant, then it gave the framework for us all to work together toward that vision."

Petrone described how this collaboration extends to budget conversations. If one department makes a funding request, the city's senior staff discuss how that request might affect other departments. For example, investments in software or other technology will likely affect the Information Technology department because they will need to be involved in the implementation. The Purchasing Department may also be affected because the city will likely need to competitively procure the software.

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DIRECTOR OF BUDGET
AND SUSTAINABILITY

if what they are proposing is going to affect another department and if they're going to have to collaborate to get it done," Giordano explained. OBS has also added a step to the budget process that involves meeting with the department proposing the new initiative, along with any departments impacted by it. At this meeting, all parties involved discuss if and how the new initiative will be funded and work through the details of how the different departments will collaborate on it.

For Petrone and her team, the collaboration doesn't stop once the city's budget is approved. DBS staff attend meetings with the operating departments throughout the year.

Giordano meets with departments monthly to go over their initiatives with both the department director and the designated performance management liaison for that department. The purpose of these meetings is to see if the city is achieving the goals outlined in its strategic plan.

"If there's something in that conversation that she feels needs to come to our attention, Nicole will bring that back," Petrone said.

Bishara regularly attends meetings with Public Works and with the Police Department's command staff. "Public Works is large, so being able to have a seat at the table for their monthly meetings allows us to stay abreast of big projects and other things they're talking about before getting into the details at our budget meetings," Petrone said.

DBS staff also sit in on monthly meetings in the Fire Department and the Parks Department, and Petrone participates in a weekly meeting with the other department heads once a week. Her staff also reviews monthly financial reports and follows up with departments if they have questions about any of the numbers. "We're always communicating with our departments and saying, 'Hey, I noticed this is a little off. Let's talk. Why are these numbers higher than normal? What's going on?'" Petrone emphasized that the purpose of these questions and conversations is to help the departments proactively address any concerns or challenges.

"We have open communication and open doors. We all pick up the phones whenever necessary and are willing to ask questions, answer questions, and provide information that anyone needs," she said.

Giordano believes that meeting with departments regularly and getting to know their operations has built what she calls a "culture of relationships," meaning that budget analysts have developed strong working relationships with their department contacts and they don't want to let them down. "Promoting collaboration happens naturally in our organization based on



The City of Coral Springs held a Thanksgiving Basket drive for the community.

the relationships that we're building across the departments," she said.

In addition to collaboration with all other departments, Andrea Lemaitre, sustainability manager, highlighted the unique structure of the DBS itself. "Our team comprises budget, grant writing, performance management, and sustainability," she said. "Not only do we communicate with all the departments, we also communicate with each other to ensure our respective projects and plans are in alignment."

The city collaborates on more than just the budget. Petrone shared another example of the city's cross-departmental collaboration: developing the city's Sustainability Action Plan. "Sustainability" was added to the Office of Budget and Sustainability in 2022, and one of the first goals for this new office was to develop a citywide plan for sustainability. Developing the plan and getting it approved by the city commission took nearly nine months, and Petrone is grateful that all departments contributed to the process. "We had sustainability liaisons brought together from every department," Petrone said. "Every single department was represented. They are all thanked in our Sustainability Action Plan and acknowledged for the time they spent on it."

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NICOLE GIORDANO
PERFORMANCE
MANAGEMENT MANAGER



In an effort to collaborate with the public, Coral Springs rolled out a "Budget and Brews" initiative to share information and get feedback on the city's budget.

"Often, sustainability or resilience offices are siloed," Lemaitre added. "However, because of the City's approach to collaboration and the DBS's unique structure, sustainability has become an integral component of Coral Springs' processes."

Bishara shared another example of a successful project that relied on close collaboration. The city's Public Works Department initially received accreditation in 2017, and the department has to go through a reaccreditation process each year. "Little did we know that this process affected Budget, Finance, Legal, Human Resources, and the City Clerk. We all had a part in gathering information, and we had to meet several times to reach that goal of accreditation," she said. "Initially, we all thought it was just Public Works, but Public Works touches everybody. We still all share the organization's goals and core values, and we all came together for that."

The city's collaborative culture also makes it more open to finding new ways to get things done. As an example, Petrone shared a story about a recent change DBS made to its process for requesting new initiatives. Previously, when a department wanted to request a new strategic initiative or business initiative, they would complete a Microsoft Word form and send it to DBS.

Giordano would then add the information to an Excel spreadsheet and upload the spreadsheet to the web-based system the city uses to track its KPIs. DBS rolled out a new process through which departments would input their requests electronically to eliminate the need for Giordano to re-enter information. DBS explained that the goal of the change was to reduce errors and increase efficiency, and it asked the departments for their feedback on the new process. "That's the kind of culture we have, where if we want to do something easier, better, more efficient, the response we get is, 'All right, train us and we'll get it done,'" she said.

The city also collaborates with the public and recently changed the way it administers its resident and business surveys, creating more timely feedback. In the past, the city would survey residents one year and then survey businesses the next year, alternating back and forth. "We're now running them both at the same time, and we're getting reports on a six-month period," Giordano said. "We're getting more timely feedback to know how we need to pivot and shift in the future."

Giordano explained that the business surveys are now being administered through the city's fire inspection process. "We switched to having fire inspectors provide the business survey onsite, since they're going to all our businesses



The city held a visioning summit for residents and businesses to come together and share their vision for the City of Coral Springs by the year 2035.

anyway. And since we changed the survey platform as well, we're able to do more micro surveys. So, this year, we were able to capture public input on a proposed ordinance change to allow recreational vehicle parking. We're able now to get that instant feedback as we're trying to make decisions," she said.

In addition, this year, to engage with the public on its budget, the city rolled out its "Budget and Brews" initiative. In one week, the city held information sessions on the budget at five local businesses, four coffee shops, and one "barcade" (bar and arcade). Petrone explained that the purpose of these sessions was to give residents an opportunity to meet with city staff outside of City Hall and have an open discussion about the budget. In addition, the city also provides budget presentations to all its boards, committees, and other groups throughout the month of August. These in-person interactions are in addition to the standard public hearings that are required as part of the city commission's adoption of the budget.

Petrone was excited to share that last year the city worked with the public on visioning for 2035, asking residents what they want to see for the City of Coral Springs by the year 2035. These year-long captured results were brought to the visioning summit earlier this year to further collaborate with city residents and businesses.

Petrone explained that the results of the visioning process will be shared with the city commission as it develops

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SUSTAINABILITY MANAGER

the city's next strategic plan to ensure that the goals are "aligned with where the residents want to see the city go."

Giordano described the multifaceted approach the city used to gather public input during the visioning process. In addition to a survey, city staff also facilitated conversations with all its boards, committees, and other groups. Staff also attended events in the community, including school open houses, and even created a

coloring form to capture feedback from the city's youngest residents. "We did a little bit of everything to really get the community involved and talking about where they want the city to go over the next ten years," she said.

Bishara explained the way in which alignment between the strategic plan and the capital budget is operationalized. If a department has a capital budget request, it fills out a new initiative form and has to explain how the request will support the mission, vision, and goals outlined in the strategic plan. In addition, the department has to explain how it will measure if the capital investment is achieving its intended goals.

Sustainability is also a consideration in developing the capital budget. Bishara said that before it invests in additional capital assets, the city makes sure it has replacement plans in place for everything it owns.

Petrone's advice to public finance leaders who want to create a more collaborative organization is to focus on communication. "The more conversations that are had, even if they're not always with the budget department, but the information comes back to the budget department, that really helps," she said. She added that developing relationships with other local governments in your area can be very helpful. Coral Springs has built relationships with staff at other cities in Broward County and beyond. She appreciates that she can reach out to those contacts when faced with a challenge that may be new to Coral Springs, but that other local governments in the region are also working on.

Giordano's advice to encourage more collaboration is "know your why." Staff at all levels of the organization need to understand the mission, vision, and goals, and also understand their role in achieving them. "We're each one piece of this giant puzzle, and we can't have missing pieces if we want to complete the image," she said. "Letting people know why they're doing what they're doing is so important—that applies to every single person in our organization." ■

Katie Ludwig is GFOA's director of resource development.