

# In Practice

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## FINANCE TEAM

# Benefits of a Collaborative Culture in Maple Ridge, British Columbia

BY ALISON WUENSCH AND KATIE LUDWIG

**A**s its 2023 rebranding strategy explains, Maple Ridge, British Columbia, is “a city on the move.” This is not just a catchy slogan—the city is transforming the way it does business and working hard to improve residents’ quality of life. And one of the keys to getting this done is its collaborative culture.

Zvi Lifshiz, director of strategic development, communications, and public engagement, attributes Maple Ridge’s

collaborative culture to its current leadership team and chief administrator. When staff present an idea to the leadership team, they are met with enthusiasm and encouragement. The “let’s try it” culture has created a sense of psychological safety at Maple Ridge, where people are comfortable with seeking out new ways of doing things, recognizing that not everything is going to succeed. Unlike many other local governments, there is some level of comfort with risk.

Trevor Thompson, Maple Ridge’s director of finance, agrees, noting that senior management could certainly say “do this” and prescribe the method for getting a particular initiative done, and it would get done—but not as quickly, and without fully taking root.

Dan Olivieri, manager of corporate planning and consultation, describes collaboration at Maple Ridge in “layers and tiers.” One layer of collaboration is the culture that leadership has instilled throughout the organization, but he also believes that people who work at the city of Maple Ridge do so on behalf of the community of Maple Ridge rather than their own interests.

“They believe they add value to the community, and I believe that actually drives them to put the interest of the community first, which means they’re not doing things in isolation,” Olivieri said. He acknowledges that there are still times when people are pressed for time and don’t collaborate as well as they should, but they recognize that there is a broader context, and that collaboration is required to work more effectively.

The Maple Ridge team provided an example of the city’s collaborative culture—a recent initiative to embed agile principles into the capital planning process. As staff were developing it, they asked several questions:

- How can the city use the iterative development process (building, refining, and improving an initiative) quickly?
- How can the city engage with asset managers throughout the organization and get them to adopt a broader perspective, rather than just thinking about their particular assets?
- How can the city design a process that engages everyone and produces operational benefits, while staying aligned with the organization’s values?

To answer these questions, the city held a series of lunch meetings, where key asset managers could score projects across four dimensions:

1. Corporate value (efficiency, effectiveness of service delivery, asset management, and more).
2. Community value
3. Council value
4. Time criticality/risk

Staff had a brief discussion of the merits of each project. They did not reach a consensus on the score for each project, but they did achieve a certain level of understanding of each project and come to agreement about the desired result for each project. All projects were prioritized using this matrix, and staff built out the capital program using this approach.

Olivieri said the capital planning process was fun and dynamic. “People could actually see how their input was having a direct impact,” he said. “I think that makes a difference. Everyone was coming at it thinking, ‘We’re giving this a try. We’re going to see how it goes. We’re going to improve and enhance this process incrementally. We’re going to strive for progress, not perfection.’ Those foundations were laid at the beginning.”

Lifshiz thinks the city’s culture of “not everything we try is going to succeed” is why people were willing to come to those sessions and give the new process a shot. “Maybe it’ll work. Maybe it won’t. But they’re not coming in there saying, ‘Oh, this is dumb. This is never going to work,’” he said. “We can iterate, and we can continuously improve, and that’s how you build a culture where people are willing to do things differently and to pivot when necessary.”

The city’s collaborative culture allows it to implement its strategic plans. In addition to a five-year financial plan, Maple Ridge also maintains an official community plan, which is focused on land use, and a council strategic plan, along with plans focusing on transportation, childcare, parks, recreation, and culture, among others.

“It’s important that someone who knows the business also knows the strategic plan and can communicate to

both the finance folks and the operations managers clearly and simply,” Thompson stressed. “You give people the right amount of knowledge, so they’re able to make the decisions, but they’re not buried in detail,” he said. The goal is to remove “the black box” so people understand how decisions are made, and doing so requires “knowing what people need to know.” At Maple Ridge, Olivieri plays this role, ensuring alignment horizontally, between the planning and the finance functions, but also vertically, on where the organization is heading.

Lifshiz calls Olivieri “the ultimate dot connector,” but Olivieri also likes to think of his role in terms of soccer, playing the position of the central midfielder. “I connect the dots between everything behind us, everything ahead of us, and I help things flow from the very back to the very front, and front to back,” he said. He brings all those pieces together in the city’s business planning process and has built a framework for the process that walks people through the individual steps, including developing metrics and analyzing financial impacts.

“I know what objectives Finance is trying to get to, and I understand where



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**ZVI LIFSHIZ, DIRECTOR OF STRATEGIC DEVELOPMENT, COMMUNICATIONS, AND PUBLIC ENGAGEMENT**

the business unit is trying to go,” said Olivieri. “Let’s try to bring them together and facilitate that discussion and help everyone speak a common language.”

“That makes it possible for us to end up with a cohesive action plan,” Thompson said.

Olivieri stresses that while his role is important, there is also openness on all ends to listening and being involved in the business planning process. Staff recognize that their sphere of understanding is limited and are willing to engage and consult with their colleagues to learn more.

“From a financial planning perspective, it’s making sure that we have all the interest holders discussing what the considerations are when we’re talking about service level increases, investments in positions, how that fits into our overall strategy, and then how it aligns with where they’re trying to go as a department,” Olivieri said.

This internal communication is especially important amid rapid change. “When you move quickly and you’re transforming the way you do business and how your community looks and acts, there’s a lot of moving parts—so it’s really incumbent on our leaders to have those open lines of communication,” Olivieri explained.

Olivieri also stressed the importance of external communication. “I try to take some of the work we do and put it into a really simple context that can hopefully resonate, and I don’t do that alone,” he said. “I relay that to our communications team, who can take that idea and elaborate on it and build a full picture of what we’re trying to do.”

This is where Lifshiz comes in. “My role is to align strategy across the organization and drive transformational initiatives around service excellence, customer experience, continuous improvement, and innovation,” he said. He also ensures that the city is telling its story to the community and to other target audiences, whether it be for talent attraction or business attraction purposes or to new residents.

Lifshiz also ensures that the city is telling its story internally to staff. He wants to make sure that as the city is





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**TREVOR THOMPSON, DIRECTOR OF FINANCE**

implementing innovative initiatives, the staff understand them, believe in them, and are on board with the change.

One such innovative initiative that Lifshiz, Thompson, and Olivieri are involved in is adopting a service-based approach to budgeting. “Public engagement is one of the reasons why service-based budgeting makes sense,” Lifshiz explained. “You set your service levels based on the feedback you’ve received from the public. Before you’ve ever gotten to talking about budget, you’ve set service levels that can be driven by community engagement and understanding what the community is looking for.”

He warned that the public’s view can shift and emphasized the need for long-term plans. “By having longer-term plans, you can pivot within a certain framework or within a certain guardrail, but you’re not doing major U-turns,” he said. “When you combine public engagement and planning, you’ve got your long-term North Star.”

Olivieri agrees that service-based budgeting has potential to help the city in its public engagement efforts and tell its story more effectively. “To engage on a budget is very challenging. To engage on what you’re going to deliver to a community is a completely different story,” he said. “In many instances, we conflate engaging on those outcomes with engaging on a tax rate increase. For us, general revenue comes from property taxation. When we go to the public, no amount of education is going to alleviate a six or seven percent property tax increase. We know housing affordability is a challenge, but when we talk to them about what they’re getting for their money, it’s a different approach, and it’s a different story that we have to tell, and we do that through a variety of mechanisms throughout the budget cycle—but it’s more focused on what we’re actually going to deliver and what value we’re giving them as residents.”



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**DAN OLIVIERI**, MANAGER OF CORPORATE PLANNING AND CONSULTATION

To help explain the benefit of moving to a service-based approach to budgeting, Lifshiz shared an analogy he picked up when talking to another local government. “When you buy an iPhone, you don’t care that Apple has a human resources department or a marketing department,” he said. “What you’re buying is the service, and that’s the value you receive.” He believes discussions about service levels “just make more sense” and will allow the city council “to compare one service against another service, as opposed to one FTE in this department versus one FTE in that department.”

As the city moves to a service-based budgeting approach, internal budget stakeholders have had to adopt a more customer-focused mindset. “Many of our leaders are domain experts within a subject. They’re not business leaders,” Olivieri explained. He sees service-based budgeting as a way to give managers the tools they need to think about how they’re managing their service and the impact it has on their customers. “It’s one lens to say, ‘I deliver a service.’ It’s another thing to say, ‘I have customers. What do I do for my customers?’” he said. “That requires a shift.”

The city made a fairly simple change to its budget planning process this year to help managers adopt this shift. For any budget changes, the budget team asked managers to quantify whether that change would maintain the existing service level or increase or enhance

the service level. Asking this question provided an opportunity to discuss the definition of a service level, the relationship between the number of customers and service levels, and how to quantify service levels.

For other governments looking to innovate and transform, Thompson, Olivieri, and Lifshiz have some recommendations. Thompson recommends defining the value proposition well to bring people along and show them that there is something in it for them. At the end of the day, he thinks most members of the team want to do better, but some people are more resistant to change. (He includes himself in that camp.) “Build in steps that you’re capable of achieving. Don’t try to do a big step. Start small. Build your momentum,” he said.

Olivieri agrees. “Start small. In our continuous improvement program, we talk about the small changes that have a big impact. What we don’t realize is that the small things we do can have massive ripple effects. The example I gave about just asking, ‘Is this a service level enhancement or maintaining a service level?’ That is a minuscule change that has caused a ripple that is gigantic in shifting how people see their budget requests. It’s the small things that make a big difference.”

Olivieri also recommends testing your ideas to find out which of them will make the biggest impact. “Test in small samples and be transparent about the test—but test it. Figure out a way to test your theory or hypothesis. If it works, start scaling. If it doesn’t, try something different,” he said.

Regarding service-based budgeting specifically, Lifshiz kept his advice simple. “Just start,” he said. “Don’t seek perfection.”

As far as developing an organizational culture that is more innovative, Lifshiz believes it’s important to get leadership on board and “make sure you’ve got the people who are willing to take that step”—because if you don’t have supportive leaders, progress will be difficult. ■

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