



INTERVIEW

The Essential Job of Communicating the Budget

A conversation with **Lyden Williams**, deputy budget director for Mecklenburg County

BY ALISON WUENSCH

GFOA's **Alison Wuensch** spoke to **Lyden Williams**, deputy budget director for Mecklenburg County, North Carolina, about budget development, communication, and more communication.

Budget development is a people business, not a numbers business." Lyden Williams, the deputy budget director for Mecklenburg County, North Carolina, knows how critical it is that the board understand the county's \$2.6 billion budget—including its development process and value. Residents also need to understand the budget. Williams knows that communicating effectively at all levels is one of the budget office's essential roles.

Williams has been in budget roles since 2014, starting off as a budget analyst for the City of Clinton, North Carolina. He progressed to budget analyst roles in Forsyth County and Mecklenburg County before assuming his current position at Mecklenburg County as deputy budget director six years ago. Williams has been in Mecklenburg County for nearly 10 years, supporting the budget director and the county manager in coordinating the development, monitoring, and implementation of the county's budget.

He oversees a team of eight staff members, whom he credits with much of his office's success.

Williams says he enjoys his role because it is something different every day, and he can put his problem-solving skills to use.

Collaboration moves the needle

Working extensively with the Mecklenburg County staff, from the county executives to the employees who key the budget requests into the system, Williams makes sure the budget process is as seamless as possible. His role requires extensive collaboration across departments, working with staff in the Human Resources Department on compensation and benefit estimates and with central finance on technical budget structure and implementation strategies. He also works with the strategy and innovation office to make sure the budgets align with the organization's goals and strategies, and to establish metrics that show how the budget is moving the needle on prioritized areas.

In addition, Williams works with the public information department to ensure that the budget is communicated to the board and residents in ways that explain how it affects their lives and how they can be involved with it. "It is really a work in support of people," Williams explained. Your budget can be perfectly balanced and aligned with the goals and objectives of your board—but if you don't communicate it effectively, you're not going to be successful."

Making the system work

Having been the lead administrator for the county budget system, Williams also understands the importance of a good budget system. "There are technical challenges in setting up a budget system that has thousands of lines of expense and revenue budget, and how that system needs to integrate with multiple disconnected systems like your human resource system, your finance system, your procurement system, your performance management system—all these



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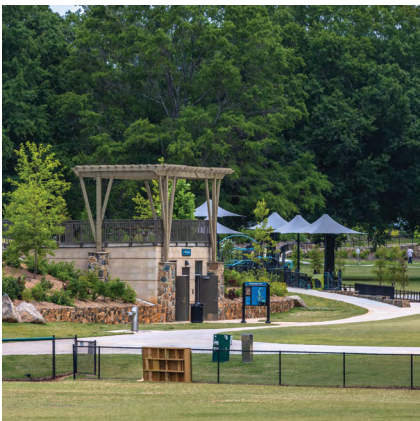
systems funnel into the budget. Helping senior management understand all that can be a challenge."

Williams and his team can't support good decision making unless departments submit accurate budget requests that reflect their real needs. "The success of the budget process is dependent on the budget system working properly," he said. And all this depends on having a robust training process that teaches users to enter budget requests accurately—which the budget team provides every year. "Put simply, if your budget system is not accurate, your budget isn't accurate; and if your budget isn't accurate, you have a major problem." Williams believes that the management of

the budget system is one of the budget office's most important responsibilities, and it can go unnoticed.

Team work and delegation

Mike Bryant, Mecklenburg County's county manager recently said something that resonated with Williams: "If you want to go fast, go alone. If you want to go far, go together." This sentiment is an important piece of Williams' pragmatic leadership style. Delegation is a skill that takes years, or even decades, to develop, and Williams has mastered it. He and the budget director are careful to avoid micromanaging their team. Instead, they empower team members to own their work and find their own paths to success.



BUDGET AT WORK: Scenes from Mecklenburg County parks, programs, and events show how the community’s budget turns public spaces and services into everyday value for residents.

This strategy—a foundational part of the county manager’s leadership philosophy of promoting accountability through ownership of process and results—is based on the book *It’s Your Ship: Management Techniques from the Best Damn Ship in the Navy*, by D. Michael Abrashoff (Grand Central Publishing, 2012). Staff members are allowed to flourish using their own styles, judgment, skills, and creativity to accomplish outcomes. In fact, Abrashoff recently spoke about the philosophy at a Mecklenburg County leadership breakfast.

This approach has paid dividends in the team’s productivity and professional development. The finance team has developed into a strong group of budgeting professionals; members are often promoted, sometimes into other local government organizations. Mecklenburg County’s senior budget analyst was recently hired as the budget director of a nearby county, and a Mecklenburg County budget analyst became the budget and finance manager of the local transit system. Williams and his director are proud to see their employees move onward and upward,

as it shows how their delegation system allows budget office staff to quickly gain the skills they need to take on larger responsibilities.

Budget analysts are assigned departmental portfolios, and they have regular opportunities to make presentations to department and county leadership on their analysis and recommendations. That’s in addition to managing multiple high-stakes and critical projects throughout the year, such as the budget system, the budget public engagement strategy, the community service grant program,

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and the quarterly budget monitoring process. County budget analysts develop the skills they need in real time, and they receive continuous feedback on how they can improve, making them more effective in the long term.

A new priority

In 2018, four of the nine county commission board member positions turned over, and the new cohort wanted to better engage with residents on the budget. At the time, this kind of intentional public engagement wasn't a priority, so the board and the county manager asked the budget office to develop a comprehensive strategy that would provide residents with multiple ways to engage in the budget process.

“We wanted the people who are affected by the budget to have an opportunity to contribute to its development and understand how they can be involved,” Williams said. The county had been doing community surveys, along with the state-required public budget hearing, but county leadership recognized an opportunity to do more.

Williams, an analyst at the time, was tasked with developing an engagement strategy and presenting a recommendation to the county manager. He researched jurisdictions across the country and presented a menu of options that focused on the amount of time a resident needs to spend in their day to contribute to the budget. He developed a range of engagement tools from quick social media activities to two-hour budget workshops at county facilities to give residents a good range of options.

The process he developed has been revised many times since the initiative

began. For example, the county used a professional polling company to administer statistically representative budget priority surveys. They have added improvements, including a public budget hearing that happens before the office's budget retreat, and balancing act budget simulators. They have engaged more intentionally with advisories for their 18-member board. The community budget workshops, which include budget activities, scenarios, and trade-offs, have helped residents understand the process.

The county also decided to engage with local high schools and colleges to educate them about what the county does, and to plug public service as a career path. “We always joke that you ask a kindergartner what they want to do for a living when they grow up, and nobody says, ‘I want to be a budget analyst.’” The county does its part to illustrate that public service can be a great career choice that allows people to be involved with the direction their community is taking.

Helping residents understand

In working to improve public engagement over the last several years, one takeaway stood out to Williams: The average resident's general lack of understanding about the roles of different governmental entities. “If you're a resident, you don't know who the police officer works for. Who does fire safety? Who does my mail? Who is in charge of the sewer line? Who collects my taxes?”

County surveys and feedback from residents showed a lack of clarity about city versus county versus federal functions. “What we try to do is make sure that residents understand which

entity is responsible for which service, so they can understand the value received for their taxes,” Williams explained. “We also recognize, as public administrators, that we have a duty to work across governmental silos to deliver services, regardless of specific statutory responsibilities.

For other local government organizations that are expanding into intentional engagement, Williams has this advice: Assess what your organization is seeking to accomplish, and ensure that your engagement strategy is unified across the organization. Know, before you ask residents, how your organization plans to use that information once you have it. Don't engage for the sake of engagement—that wouldn't honor the time and effort your residents have put in. A unified strategy, where the left hand knows what the right hand is doing, helps ensure you aren't contradicting yourself in message or tone.

Conclusion

Williams reinforces that the budget can't be developed in a vacuum. It requires intentional engagement from the board, from residents, and from partners across the public and private sectors. “Your budget isn't just a spreadsheet with numbers,” Williams said. “It is a reflection of a community's values.”



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