Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

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*Moderator:*  
**Kass Forman**, Manager, Programs and Research, Institute on Municipal Finance and Governance

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Land Acknowledgement

We wish to acknowledge this land on which the University of Toronto operates. For thousands of years it has been the traditional lands of the Huron-Wendat, the Seneca, and most recently, the Mississaugas of the Credit. Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.
Questions?

Ask in person

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Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

Stephanie N. Ortynsky, PhD
Institute on Municipal Finance & Governance (IMFG)
School of Cities, University of Toronto
Today’s Agenda

1. Primer on wellbeing frameworks, measures, and budgeting
2. Study on wellbeing budgeting in New Zealand
   • (Ortynsky, Farag & Mou, 2023)
3. Wellbeing developments and frameworks in Canada
4. Study on wellbeing readiness and initiatives in Saskatchewan municipalities
   • (Camacho, Cazakoff, Khovrenkov, Mann & Ortynsky, 2023)
5. Wellbeing budgeting lessons for Canadian municipalities
Presentation Key Points

- **Budgeting Can Do More With Wellbeing and Financial Indicators.**

- **There’s Significant Progress in Canada at All Levels of Government.**

- **Coordinated, Legislated Implementation, and Political Leadership Are Required to Fully Integrate a Wellbeing Ethos Into Budget Process and Decision-Making.**
1. Wellbeing Frameworks, Measures, and Budgeting
GDP and Wellbeing

Wellbeing Frameworks, Measures, and Budgeting

• GDP is a fundamental driver of wellbeing up until a certain point.
• Referred to as the “Happiness Paradox.”
• Similar trend for individuals as for nations.
Wellbeing Approach

Wellbeing Frameworks, Measures, and Budgeting

• Bhutan set the tone in 1972, when King Jigme Singye Wanghuck declared that "Gross National Happiness" was more important than GDP.
• *Green Budgeting* from the Brundtland Commission of 1987.
• In 2008, the Sarkozy Commission in France issued a call for both better measurements and broader measures of national well-being (Graham, 2011).
• Governments have begun to measure wellbeing around the world.
A Global Movement of Wellbeing Frameworks

- Scotland National Performance Framework, 2007
- UK Measuring National Wellbeing, 2010
- OECD’s Better Life Index, 2011
- World Happiness Report for the UN, 2012
- Wellbeing Economy Alliance (WEAll), 2018
- New Zealand Wellbeing Budget, 2019
- Quality of Life Framework for Canada, 2021
Researchers have argued that measures of wellbeing are needed to complement existing economic and social indicators.

The **Living Standard Framework**, which operationalized New Zealand’s social investment approach, was developed by Treasury.

**Wellbeing Frameworks**
Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

Wellbeing Frameworks, Measures, and Budgeting

Quality of Life Framework for Canada

Prosperity

- Income and growth
  - Household income
  - GDP per capita
  - Productivity
  - Access to high-speed internet
  - Household wealth
  - Investment in in-house research and development
  - Public non-financial subsidies to GDP ratio
- Firms growth

Employment and job quality
- Employment
  - Labour and unemployment
  - Wages
  - Proportion of part-time work
- Job satisfaction

Skills and opportunity
- Youth see development, education or training
- Access to early learning and child care
- Graduates and student and adult skills
- Postsecondary attainment
- Future outlook

Economic security and deprivation
- Housing: needs
- Poverty
- Precarious forms: income; stocks: financial well-being
- Homelessness
- Food security

Health

- Healthy people
  - Health-related quality of life expectancy
  - Self-rated mental health
  - Self-rated health
  - Physical activity
  - Functional health status
  - Children vulnerable in early development
- Health care systems
  - Timely access to primary care provider
  - Unmet health care needs
  - Unmet needs for mental health care
- Access to supplementary health insurance
- Unmet needs for home care
  - Cost-related non-adherence to prescription medication

Environment

- Environment and people
  - Air quality
  - Drinking water
  - Climate change adaptation
  - Natural disasters and emergency preparedness
  - Suitable conditions for local environment
  - Recognized by citizens
  - Considered by officials
  - Water quality in Canada
  - Urban and rural
  - Marine and coastal ecosystems

Society

- Culture and identity
  - Sense of pride and belonging to Canada
  - Positive perceptions of economy
  - Indigenous languages
  - Knowledge and statistics
  - Participation in cultural or religious practices, recreation
- Social cohesion and connections
  - Sense of belonging to local community
  - People to count on
  - Trust in others
  - Volunteering
  - Satisfaction with personal relationships
  - Family and friends
- Wellness
  - Accessible environments
- Time use
  - Time use
  - Satisfaction with time use

Good Governance

- Safety and security
  - Personal safety
  - Crime reports
  - Perceptions of neighborhood safety after dark
  - Childhood maltreatment
- Institutionalized准备
  - Institutionalized preparation
- Democracy and institutions
  - Confidence in institutions
  - Voter turnout
  - Representation of seniors, leaders in positions
  - Canada's place in the world
  - Multi-dimensional social media
  - Indicators of sustainability
  - Economic performance
- Justice and human rights
  - Discrimination and anti-treatment
  - Cyberbullying
  - Access to fair and equal justice (civil and criminal)
  - Resolution of serious legal problems
  - Incosensetion rates

The Sustainability and Resilience lens promotes long-term thinking by considering the trajectory of indicators in order to identify risks, build resilience and ensure that policy choices are contributing to a higher quality of life not only now but in the years ahead.

The Fairness and Inclusion lens is intended to inform policy and program development, leading to greater equity and equality, by assessing the distribution of outcomes for different populations in Canada.
OECD Better Life Framework

Wellbeing Frameworks, Measures, and Budgeting

• Measures used frequently in economics, such as GDP, inflation rate, interest rate, unemployment rate, and government-to-debt GDP are starting to be seen as only part of the equation.

• Wellbeing dimensions require indicators to measure them.

• The OECD (2018) proposes that dimensions such as income and wealth; work and job quality; housing; health; knowledge and skills; environmental quality; subjective wellbeing; safety; work-life balance; social connections; and civil engagement be measured with averages, inequalities between groups, and deprivations.
# Wellbeing Measures and Indicators

<table>
<thead>
<tr>
<th>Health</th>
<th>Living Standards</th>
<th>Education</th>
<th>Leisure and Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life expectancy at birth</td>
<td>Life satisfaction</td>
<td>Percentage of aged 0 to 5 with regulated childcare spaces</td>
<td>Time spent on leisure activities</td>
</tr>
<tr>
<td>Population rating of mental health</td>
<td>After-tax median income of family</td>
<td>Average expenditure per public school student</td>
<td>Attendance of performing arts performances</td>
</tr>
<tr>
<td>Level of stress</td>
<td>Average gross earnings for full-time employees</td>
<td>Ratio of students to teachers</td>
<td>Hours volunteering for culture</td>
</tr>
<tr>
<td>Population without activity-based limitations</td>
<td>Percentage living in poverty</td>
<td>Average undergrad tuition fees</td>
<td>Visits to national parks and historic sites</td>
</tr>
<tr>
<td>Percentage of people who report a disability</td>
<td>Proportion of people living below 50% median income</td>
<td>Competencies of the adult population</td>
<td>Number of nights away on vacation</td>
</tr>
<tr>
<td>Prevalence of daily smoking</td>
<td>Gini coefficient (income gap)</td>
<td>Cognitive skills of 15-year-old population (mean score for reading, math, and science)</td>
<td>Growth in cultural economy</td>
</tr>
<tr>
<td>Vaccination rate</td>
<td>Household debt</td>
<td>Skill shortage vacancies</td>
<td>Visits to the outdoors</td>
</tr>
<tr>
<td>Obesity prevalence</td>
<td>Gender pay gap</td>
<td>Workplace learning (job-related training)</td>
<td>People working in culture and arts</td>
</tr>
<tr>
<td>Suicide rate</td>
<td>Food insecurity</td>
<td>Human capital (value of skills in the labour market)</td>
<td></td>
</tr>
<tr>
<td>Time Use</td>
<td>Community</td>
<td>Economic Capital</td>
<td>Environment</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Labour force working under 30 hours (not by choice)</td>
<td>Sense of belonging to community</td>
<td>Produced fixed assets</td>
<td>Threatened birds, mammals, and marine life</td>
</tr>
<tr>
<td>Percentage of labour force with regular weekday hours</td>
<td>Percentage with 5 or more close friends</td>
<td>Financial net worth of the total economy</td>
<td>Emissions of GHGs</td>
</tr>
<tr>
<td>Percentage with flexible work hours</td>
<td>Quality of public services</td>
<td>Number of open data sets available publicly</td>
<td>Ecological footprint</td>
</tr>
<tr>
<td>Percentage of people participating in sporting activities three or more times per week</td>
<td>Percentage of adults who agree that, in their neighbourhood, there are places to meet and socialize</td>
<td>Total official support for sustainable development</td>
<td>Satisfaction with water quality</td>
</tr>
<tr>
<td>Commute time</td>
<td>Percentage of adults who felt lonely at least some of the time</td>
<td>Investment in research and development</td>
<td>Renewable energy as a percentage of total primary energy supply</td>
</tr>
<tr>
<td>Percentage with 7 to 9 hours of quality sleep</td>
<td>Perceptions of local crime rate and safety</td>
<td>Multifactor productivity growth</td>
<td>Air quality</td>
</tr>
<tr>
<td>Average daily time with friends</td>
<td>Crime severity index</td>
<td>Number of businesses</td>
<td>Household waste recycled</td>
</tr>
<tr>
<td>Percentage of time spent on unpaid domestic or care work</td>
<td>Trust in police</td>
<td>Inflation rate</td>
<td>Forest area under an independently verified forest management certification</td>
</tr>
</tbody>
</table>

**Wellbeing Measures and Indicators**
Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

- A budget is a value statement.
- The budget process can be technically reformed with governance and measurement.
- Consideration of political interactions between actors required for budget reform.
- Wellbeing as a budgeting outcome.

Image source: https://pbs.twimg.com/media/DxPemqiXcAA0BD3.jpg
Overarching Political Framework

Budget Actors (Good, 2011 & 2014)

Priority setters (Politicians)

Guardians (Treasury Board)

Watchdogs

Spender (Ministry A)

Spender (Ministry B)

Spender (Agency A)

Spender (Agency B)

Wellbeing Frameworks, Measures, and Budgeting
Overarching Political Framework

Municipal Budget Actors

- Mayors/Councillors
- Financial Office
- Budget Committee
  - Department A
  - Department B
  - Department C
  - Department D

Wellbeing Frameworks, Measures and Budgeting
2. Study on Wellbeing Budgeting in New Zealand

Ortynsky, Farag & Mou, 2023
New Zealand’s Approach to Wellbeing

• Emphasis on citizen wellbeing along with economic indicators such as GDP.

• Prioritization of societal outcomes:
  o mental health; child wellbeing; Māori and Pasifika aspirations; national productivity and greening the economy.

• Indicators of future success: natural capital, social capital, human capital, financial, and physical.
Key Developments in New Zealand’s Approach

- Public Finance Act, 1989
- Amendments to the Act, 2004
- Social Investment Approach
- Living Standards Framework, 2007-08
  - Created by Treasury and a challenge group of experts from academia
  - Framework to assess budget bids
- Wellbeing Budget, 2019
My goal was to determine if New Zealand’s wellbeing budgeting approach could serve as a model for future budgetary reforms in Canada.

The research strategy for this study included a case study method, which allowed for purposeful sampling (Patton, 2015) and an in-depth perspective.

I focused on the political aspects of budgeting, while considering the technical approaches.
Wellbeing Budget Adoption and Implementation in New Zealand

- New Zealand adopted a legislatively supported performance-based budgeting system in 1989.
- In 2011 the Treasury’s Living Standards Framework was published and implemented by Treasury.

Study Methodology

Wellbeing Budgeting in New Zealand

Interviewed 10 spenders, nine guardians (current or former Treasury officials), two priority setters (politicians), and nine academics.

Conducted a deductive analysis and coded all 20 interviews on a five-level Likert scale with 22 key informants.

Interview data was re-analyzed inductively for additional adoption themes.
### Study Methodology

#### – Key Informant Positions

**Wellbeing Budgeting in New Zealand**

<table>
<thead>
<tr>
<th>Interview #</th>
<th>Respondent Classification</th>
<th>Ministry</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Spender 1</td>
<td>Ministry of Business, Innovation and Enterprise (MBIE)</td>
</tr>
<tr>
<td>2</td>
<td>Spender 2 / Guardian 1</td>
<td>Ministry of Business, Innovation and Enterprise (MBIE)</td>
</tr>
<tr>
<td>3</td>
<td>Spender 3</td>
<td>Transport</td>
</tr>
<tr>
<td>4</td>
<td>Spender 4 / Spender 5</td>
<td>Transport</td>
</tr>
<tr>
<td>5</td>
<td>Spender 6 / Guardian 2 / Spender 7 / Guardian 3</td>
<td>Environment</td>
</tr>
<tr>
<td>6</td>
<td>Spender 8</td>
<td>Environment</td>
</tr>
<tr>
<td>7</td>
<td>Spender 9 / Guardian 4</td>
<td>Environment</td>
</tr>
<tr>
<td>8</td>
<td>Guardian 5</td>
<td>Treasury</td>
</tr>
<tr>
<td>9</td>
<td>Guardian 6 / Academic 1</td>
<td>Treasury</td>
</tr>
<tr>
<td>10</td>
<td>Guardian 7 / Academic 2</td>
<td>Treasury</td>
</tr>
<tr>
<td>11</td>
<td>Guardian 8 / Academic 3</td>
<td>Treasury</td>
</tr>
<tr>
<td>12</td>
<td>Guardian 9 / Academic 4</td>
<td>Treasury</td>
</tr>
<tr>
<td>13</td>
<td>Guardian 10 / Academic 5</td>
<td>Treasury</td>
</tr>
<tr>
<td>14</td>
<td>Priority Setter 1</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Priority Setter 2 / Guardian 11</td>
<td>Treasury</td>
</tr>
<tr>
<td>16</td>
<td>Academic 6 / Spender 10</td>
<td>Environment</td>
</tr>
<tr>
<td>17</td>
<td>Academic 7</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Academic 8</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Academic 9</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Guardian 12</td>
<td></td>
</tr>
</tbody>
</table>
Study Results – Interview Coding

Adopting Wellbeing Budgeting in New Zealand

- When asked if the adoption of the wellbeing budget was a political process, suggesting it was led by priority setters, 90% of participants indicated the adoption of the wellbeing budget was ‘entirely’ (12) or ‘somewhat’ (6) political.
- Most respondents (90%) indicated that internal government budget actors influenced the wellbeing budget adoption and implementation ‘entirely’ (14) or ‘somewhat’ (4).
- A large majority of respondents (94%) said that the adoption was ‘entirely’ (8) or ‘somewhat’ (10) influenced by external influences.
- Seventy percent of respondents said that New Zealand culture had ‘entirely’ (9) or ‘somewhat’ (5) influenced the development of the wellbeing budgets.
- Although participants were not specifically asked about COVID-19, eight respondents addressed its impact on the most recent budget.
Study Lessons & Takeaways
Putting Wellbeing on the Agenda

Lessons
• Political leadership is key
• Internal interaction of administrators matter
• Willingness to learn and connect to broader networks
• Overall culture in New Zealand

Takeaways
• It is a process and evolution; we cannot expect to arrive tomorrow
• Incentivize ourselves and others to consider this approach
• Wider communication and transparency helps
Study Results – Interview Coding

**Implementing Wellbeing Budgeting in New Zealand**

- No respondents indicated that the budget had been ‘entirely’ or ‘not at all’ implemented as intended.
- **Sixteen (73%) respondents** said that the wellbeing budget had been ‘somewhat’ implemented as intended, while four said that ‘very little’ of what had been intended had been achieved.
- **Eight (36%) interview participants** said that the budget had not yet been implemented as intended, in part due to the COVID-19 pandemic.

- A further analysis of the interviews beyond the deductive identification of whether the budget had been implemented as intended was done with the Strategic Action Framework.
- Implementation activities shift both “system operations” and “the behaviour or conditions of an external target group” (Moulton & Sandfort, 2017).
Challenges & Successes

Implementing Wellbeing Budgeting in New Zealand

System Operations

Challenges (Opportunities):
- Wellbeing budgets are still being refined
- Quantification and more robust approaches to measure success
- Wellbeing topics are more relevant to some departments compared to others

Successes:
- Public sector is academic, youthful, and vibrant
- Indigenous framework created
- Increased propensity to try novel approaches
Successes & Challenges

Implementing Wellbeing Budgeting in New Zealand

**Behaviour Conditions**

- **Successes:**
  - Inclusiveness and diversity in community
  - Social innovation
  - Shift to longer-term thinking
  - Shift in applying a wellbeing lens to budget bids

- **Challenges (Opportunities):**
  - Long-term view is required for a wellbeing approach
  - Still figuring things out
3. Wellbeing Developments and Frameworks in Canada
A significant gap is shown between Canada’s GDP and wellbeing growth...

Grey – GDP
Teal – Canadian Index of Wellbeing

Wellbeing Developments and Frameworks in Canada

Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?
Wellbeing Developments in Canada

Wellbeing Developments and Frameworks in Canada

- Canadian Index of Wellbeing, 2016 & 2018
  - Ontario, 2014; Nova Scotia, 2018; Saskatchewan, 2019; Yukon, 2020
- WEAll Can: The Wellbeing Economies Alliance for Canada and Sovereign Indigenous Nations, 2018
- Canadian Index of Child and Youth Wellbeing, 2019
- Statistics Canada Quality of Life Hub, 2022
The most recent count done by the Canadian Wellbeing Knowledge Network (CWKN) has documented 357 wellbeing indicators, indices, frameworks, strategies, proposals, programs, conference proceedings, surveys, documents, reports, and initiatives from Canadian municipalities, provinces, First Nations, think tanks, foundations, not-for-profit organizations, health authorities, and wellness centres.

Canadian wellbeing policy initiatives database (CWKN)
4. Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

Highlights from Saskatchewan Urban Municipalities Association (SUMA) Convention Presentation

Camacho, Cazakoff, Khovrenkov, Mann & Ortynsky, 2023
The SIW report is a resource that expands our understanding of how well our communities and citizens are faring beyond the economic measures of the Gross Domestic Product (GDP).
What Can Municipalities Learn and Contribute?

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

Services provided by local authorities define citizen well-being and residents’ quality of life.

Local authorities attract residents by improving community’s quality of life through improved local services.

Survey of Municipal Wellbeing
Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

Survey launch (July 2022): 452 SK municipalities received survey invitation
Survey end (September 2022): 25% of SK municipalities responded to survey

- City & Town: 48%
- Rural: 52%

- Administrators & staff: 92%
- Elected officials: 8%
Municipalities Are Well Aware of the Wellbeing Needs of their Communities

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

<table>
<thead>
<tr>
<th>Community Needs</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts, culture and sport amenities/spaces</td>
<td>36%</td>
</tr>
<tr>
<td>Availability of necessary health care services</td>
<td>22%</td>
</tr>
<tr>
<td>Adequate access to schools, libraries,…</td>
<td>20%</td>
</tr>
<tr>
<td>Safety and policing</td>
<td>18%</td>
</tr>
<tr>
<td>Road infrastructure and road safety</td>
<td>14%</td>
</tr>
<tr>
<td>Assistance for marginalized persons</td>
<td>10%</td>
</tr>
<tr>
<td>Economic sustainability and growth</td>
<td>6%</td>
</tr>
<tr>
<td>Less government regulations,…</td>
<td>6%</td>
</tr>
<tr>
<td>Adequate water and sewer infrastructure</td>
<td>4%</td>
</tr>
<tr>
<td>Access to places of nature</td>
<td>2%</td>
</tr>
<tr>
<td>Housing</td>
<td>2%</td>
</tr>
</tbody>
</table>

Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?
Main Challenges for Municipalities

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities
Municipalities are Incorporating Wellbeing Elements into Community Policy Documents

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

- 17% of municipalities adopted a wellbeing approach in their official community plans.

<table>
<thead>
<tr>
<th>What changed with adoption of wellbeing approach?</th>
<th>Challenges to adopt a wellbeing approach?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal process, council agendas, policy, planning and budgeting, multi-sectoral partnerships</td>
<td>Lack of financial &amp; human resources, data on well-being on decision-making, time, community &amp; team support</td>
</tr>
</tbody>
</table>

- 55% of municipalities are considering community wellbeing elements when developing policies.
Municipalities Welcome a Wellbeing Approach to Decision-making

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

- Interested in adopting a wellbeing approach – 46% say ‘Yes’
- Interested in learning about quality-of-life frameworks – 69% say ‘Yes’

- **Resources required:** staff resources, planning capabilities, assistance with updating Official Community Plans (OCPs), etc.
Together, Municipalities Know their Important Role in Fostering Community Wellbeing

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

- Consider well-being when deciding on new funding
- Advocate to provincial or federal levels of government
- Modify current community initiatives with a well-being focus
- Collaborate with Indigenous governments
- Convene and lead well-being initiatives
- Partner with local nonprofits
- Take stock of what's been done
Next Steps for a Wellbeing Approach in Municipalities

Study on Wellbeing Readiness and Initiatives in Saskatchewan Municipalities

- Municipalities are on the right track.
- Experiment, track results, and share ideas and findings with others.
- Have solution-oriented conversations to address the gaps and issues that your municipality faces.
- A holistic approach is key. What budget allocations and investments can have a multi-pronged impact?
- Implementation is the most important step, give you and your team permission to “fail.”
Communities are implementing holistic approaches to addressing complex community issues.

Policy-makers and decision-makers are making decisions based on solid, comprehensive evidence.

Citizens are empowered to advocate for change that results in the highest possible quality of life for all.
5. Wellbeing Budgeting Lessons for Canadian Municipalities from Studies
Wellbeing Budgeting in Canadian Municipalities
Lessons from Studies

In Canada, we are on the right track.

- Coordinate and join efforts on this work with other municipalities, First Nations, regional, provincial, federal levels of government to identify winning strategies.
- Make use of the frameworks and data already available nationally and locally.
- Align measurements (indicators) to your municipal priorities, both political and technical.
  - “What’s measured matters.”
- Analyze funding allocations through a wellbeing lens, i.e. evidence-informed budgeting.
- Integrate into the budget process and decision-making.
- Make it binding with a municipal wellbeing budgeting policy and/or provincial and federal requirements.
BUDGETING CAN DO MORE WITH WELLBEING AND FINANCIAL INDICATORS.

THERE’S SIGNIFICANT PROGRESS IN CANADA AT ALL LEVELS OF GOVERNMENT AND THE SOCIAL SECTOR.

COORDINATED, LEGISLATED IMPLEMENTATION AND POLITICAL LEADERSHIP ARE REQUIRED TO FULLY INTEGRATE A WELLBEING ETHOS INTO BUDGET PROCESS AND DECISION-MAKING.
Questions?

Ask in person

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Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

Stephanie N. Ortynsky, PhD
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Analysis of Strategic Action Fields (SAF) in the Implementation of New Zealand’s Wellbeing Budgets

Dimensions of Policy Context

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>New Zealand’s Wellbeing Budgets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Domain</td>
<td>Government budgeting</td>
</tr>
<tr>
<td>Initiation</td>
<td>Treasury</td>
</tr>
<tr>
<td>Scope</td>
<td>National government</td>
</tr>
<tr>
<td>Policy Type</td>
<td>Wellbeing budget implementation</td>
</tr>
<tr>
<td>Targets</td>
<td>All ministries and departments</td>
</tr>
<tr>
<td>Frontline</td>
<td>Budget actors – guardians and spenders</td>
</tr>
<tr>
<td>Desired Outcomes</td>
<td>Dependent on the year</td>
</tr>
</tbody>
</table>

Source: Adapted from Moulton & Sandfort (2017).
# Results of Implementing Wellbeing Budgeting in New Zealand

## New Zealand Budget Actors’ Perceptions of Budget Implementation Using the SAF Framework

<table>
<thead>
<tr>
<th>Role</th>
<th>Change in system operations</th>
<th>Change in target behaviour or conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Success</td>
<td>Challenge</td>
</tr>
<tr>
<td></td>
<td>Challenge</td>
<td>Success</td>
</tr>
<tr>
<td><strong>Politicians (Priority setters)</strong></td>
<td>• Wellbeing budgets are still being refined</td>
<td>• Inclusiveness and diversity in community</td>
</tr>
<tr>
<td></td>
<td>• Previous approach being re-marketed</td>
<td>• Social innovation</td>
</tr>
<tr>
<td><strong>Treasury (Guardians)</strong></td>
<td>• Treasury culture is academic, youthful, and vibrant</td>
<td>• Quantification and more robust approaches to measure success</td>
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<tr>
<td></td>
<td>• Indigenous Living Standard Framework created</td>
<td></td>
</tr>
<tr>
<td><strong>Ministries (Spenders)</strong></td>
<td>• Increased propensity to try novel approaches</td>
<td>• Wellbeing measures are more relevant to the topics of some ministries than others</td>
</tr>
</tbody>
</table>

Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?
Wellbeing Initiatives in Provinces and Territories

Wellbeing Developments and Frameworks in Canada

- Engage Nova Scotia
- Ontario Trillium Foundation Wellbeing Reports
- Yukon Index of Wellbeing
- Centering First Nations Concepts of Wellbeing: Toward a GDP-Alternative Index in British Columbia
Local and Regional Wellbeing Plans

Wellbeing Budgets in New Zealand and Canada: What Can Municipalities Learn?

- RECOVER Urban Wellbeing Edmonton
- Vital Signs (several communities across the country)
- Wood Buffalo Social Sustainability Plan
- Community Safety and Wellbeing Plans
- Wellbeing Waterloo Region

Wellbeing Developments and Frameworks in Canada