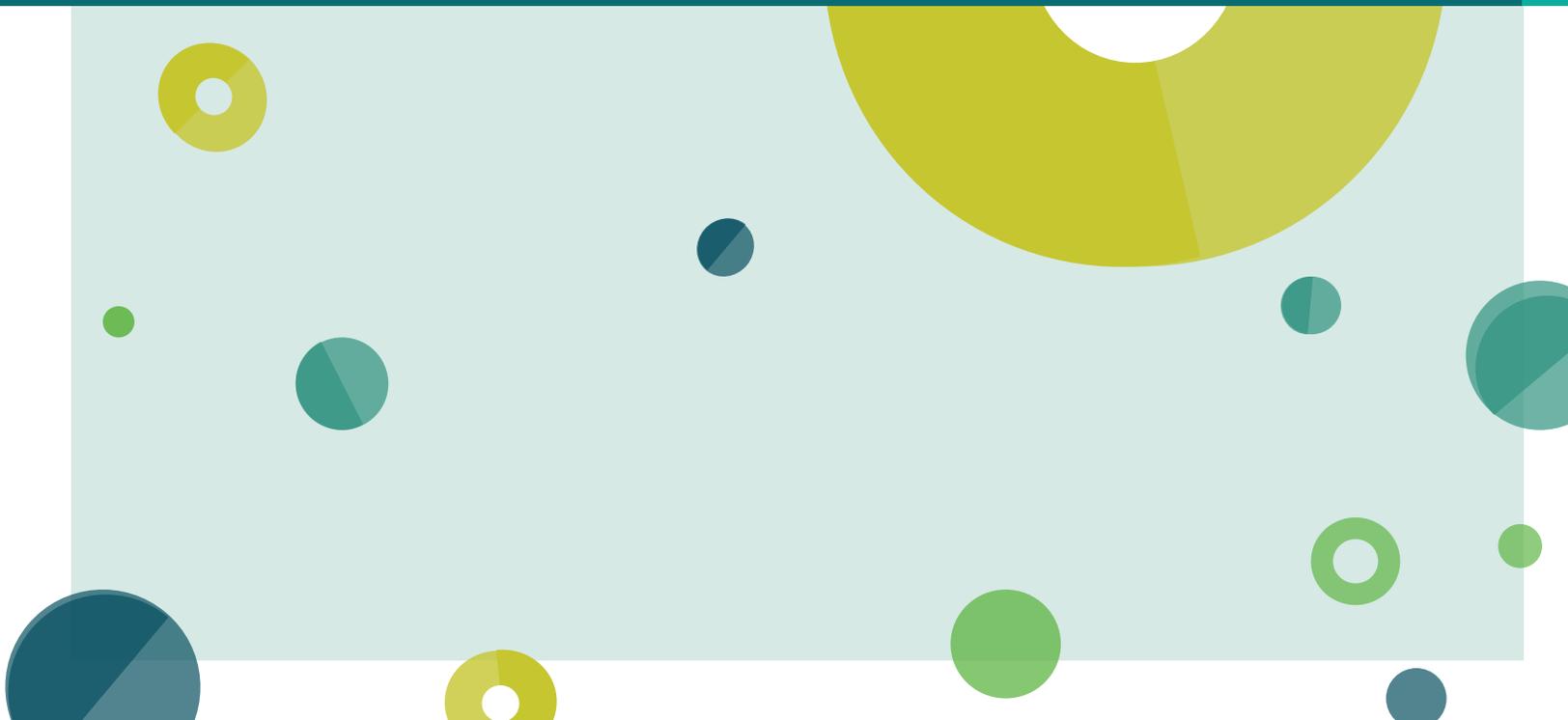




PARTICIPATORY
BUDGETING PROJECT

Participatory Budgeting in Schools Evaluation Toolkit: Why Data Matters



Why Data Matters

Research and evaluation have been critical to the expansion and improvement of participatory budgeting (PB) since it first came to North America in the early 2000s. Local evaluators and researchers took on the task documenting how PB unfolded locally to show what's working well and what can be improved. By examining how PB works, who takes part, and how it impacts local communities and democracy, evaluation data can be used to make the case for why PB should be continued and expanded.

Why is it important to do evaluation?



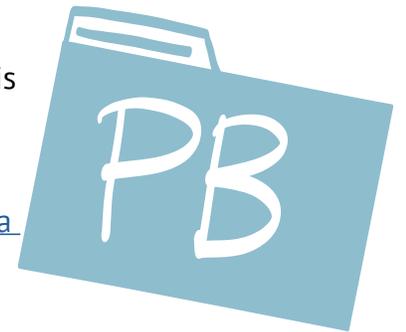
The data collected as part of evaluation processes helps:

- Stakeholders better understand and communicate the transformative power and benefits of PB.
- Celebrate the work that goes into the process, strengthens the credibility of PB, secure or maintain funding in future years, and spreads the program to new schools.
- Determine if participation is equitable.
- Identify what impacts the program has on students and the school community at large.
- Students and educators improve future PB process by giving people a chance to identify both strengths and growth opportunities.
- Students reflect on their experiences and share what they've learned.
- Track whether you met the goals you set together.

What kind of data does PBP track?

Over the past decade, Participatory Budgeting Project (PBP) has both collected data directly and played a coordinating role to identify best practices and share information.

PBP's Process Tracking Database contains basic descriptive information about all the PB processes in the US and Canada. We use it to power [this interactive map](#). As the most comprehensive list of PB processes in the US and Canada, this database makes it possible to tell the story of the growth of PB to new locations and to new contexts like schools. Take a quick look at the map and make sure your process shows up. If it doesn't, please fill out this [data submission form](#) so that your story can be included.



Process tracking does not track individual-level data about who takes part, so it is of limited value for evaluating PB. That's why people who help implement PB play such a crucial role in collecting data for evaluation. PBP offers this toolkit and accompanying survey and debrief templates to help make these efforts easy and effective.

Best Practices for School PB Evaluation

This guide outlines several options for evaluation, but at a minimum we recommend:

- Holding a debrief at the end with input from all stakeholders (students on PB Committee, teachers, staff, admin, parents/guardians).
- Conducting a pre-survey of PB Committee members at the beginning of the process and a post-survey after the vote.
- Tracking aggregate data on the main results of the process (such as the number of ideas collected and the voter turnout) and the design of the process (such as the budget size and how the PB Committee was recruited).

Kinds of PB Evaluation

When we talk about evaluating PB, we are talking about three types of evaluation you should consider for your school's PB process.

Participation Evaluation

Participation evaluation collects data about who is participating and how. This is essential because one of the central goals of PB is to establish a democratic process that is not only open to anybody in principle, but that actually succeeds in equitably eliciting the involvement of communities as a whole. We want to make sure that the process is not dominated by the “usual suspects” who are already privileged in engaging in civic life and want to make sure that communities that have been historically marginalized from centers of power are participating deeply as well.



In schools, this means making sure that all grades, all demographics, and groups like English language learners and students with disabilities can all meaningfully participate. If a process allows adults to vote (families and/or teachers/staff), it means ensuring that students still play a leading role throughout the process. While this applies to participating in the voting and idea submission stages, it is particularly important in the context of sitting on the PB committee (i.e., students leading the process and developing project proposals—sometimes called budget delegates) because a lot of influence over the outcomes is exercised at the stage of developing project ideas into feasible proposals listed on the ballot.

Specific measures of participation evaluation include: the number of people taking part in each stage of the process (e.g. submitting ideas, developing project proposals, and voting); the age, gender, and race/ethnicity of participants; and the typical grades and degree of school involvement of participants.

Impact Evaluation

Impact evaluation measures the effects that the PB program has on individual participants and on the school community as a whole. This includes assessing if the PB process fosters a sense of community within the school, strengthens feelings of self-efficacy and empowerment, and develops “building blocks” of civic engagement. On an individual level, do students gain knowledge, learn skills, shift their attitudes, or change their practices after participating in PB? On the campus level, does the school climate improve?

Measuring impact evaluation involves surveys or interviews. In order to gauge change, it is essential to obtain data using the same tools both before and after the implementation of the program. This isn't always feasible to do for the whole population of students who take part in voting, but it is really valuable to at least do so for students who serve on the PB Committee.

PBP's survey templates are designed to be short and accessible so they include some of the most important questions about student knowledge, attitudes, skills and practices. For example, to measure changes in attitudes, there are questions like, “Do you feel you have a voice in decision-making?” To assess the development of skills, the survey asks how comfortable students are leading a discussion with other students, speaking in front of a classroom, and organizing others to solve a problem. To estimate shifts in practices, surveys question whether students speak to teachers one-on-one, what their attendance, grades and extracurricular activities look like, and whether they have participated in civic activities such as volunteering.

Process Evaluation

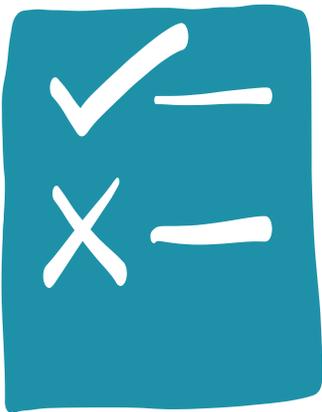
Process evaluation aims to gain information that can help make the operation of the PB process better in the future. This information can be gathered from participants, the PB coordinators, other educators and administrators, and parents/guardians. It asks questions like: What worked well? What needs improvement? How could the process be different in the future? Process evaluation is like a large-scale brainstorming session about how to improve the initiative in the future.

Stages of Data Collection

Each of PBP's evaluation survey templates are designed to be utilized at one of three stages in the PB process. Surveys of PB Committee members/ budget delegates are intended to serve the purposes of impact and participation evaluation. A pre-program survey is designed for the very outset of the process, ideally when the Committee meets for the first time before much work has begun. It has a nearly identical counterpart to be administered at the end of the cycle, right after winning projects have been selected (this may be some time before projects are actually implemented).

Surveys of voters can be distributed at the time of voting. They therefore reach a far wider segment of the student population. Yet they are typically shorter than PB committee surveys and are not usually administered both before and after the program so they are less useful for measuring impact evaluation. Their main purpose is thus to contribute to process evaluation.

Evaluating PB for Different Age Groups



Just as the goals for PB in a 2nd grade class will differ from PB in a 12th grade class will differ, so will the goals and methods of evaluating the process. For the youngest elementary school students, the perspectives of teachers and parents are the most important sources of information and evaluation simply asks students whether they experienced the process positively. For the oldest high school students, we can assess impacts of school PB on rather adult-like activities such as volunteering or participating in a protest or gathering information about attitudes related to the goals of the process like their sense of belonging to school community. Please keep this in mind while reviewing any of our survey example or templates.

Evaluation Options

School PB programs will have differing evaluation needs and capacities to dedicate to it. We suggest that even smaller-scale programs will benefit greatly from the insights that can be gained by reaching out to the people most deeply involved with the process—the PB Committee and the adults that play key roles running the program. We then offer additional tools for programs that have more capacity to dedicate to evaluation or which have a greater need for detailed information about PB’s impacts (such as pilot programs that will soon be scaled up, reports to funders, etc.).

Minimum Evaluation Recommendations

- Collect data on the main results of the PB process, including the budget, the number of ideas collected, number of projects on the ballot, the number of voters, the distribution of participants by grade levels, ethnicity, or goal-based criteria (e.g., if a goal was to get English Language Learners more involved, collect data to help you determine the success of your efforts).
- At the beginning of the process, collect pre-survey data from members of the PB Committee and collect post-survey data from them after the vote.
- At the end of the process, hold a debrief to celebrate the process and learn from the experiences of all the participants involved in PB (e.g., PB Committee members, teachers, staff, administrators, and parents or caretakers if relevant).



Additional Evaluation Recommendations

- Collect data about how voters feel about the process and data about who is voting
- Collect data during idea collection by adding one or two questions to the idea collection form, or doing a pre- and post-survey of those who submitted ideas
- Collect data specific to the goals of your school or district's PB process. If the goal of your process is to establish or build a sense of community at your campus, then you may want to collect data on attitudes or beliefs related to that.
- Keep a living document to jot down immediate reflections or highlights learned throughout the process. For example, did PB idea collection identify needs that could not specifically be addressed through PB but that schools could continue to work on? Was additional funding (beyond what was initially announced) allocated to projects identified in PB?

Focus of Evaluation	Resources
Participation, and Impact	PB Committee Pre-survey and Post-Survey (middle/high school student example) Questions for customizing surveys
Process	PB Committee Debrief (can be done with teachers and administrators as well) Self-reflection Questions (elementary school)

Data Sharing and Management

We encourage schools to systematically document information both to make it easy to reflect on what happened at the initial phases when you get to the end of the process and also because it makes it easier to implement recommended changes in future cycles. And considering that participatory budgeting is inherently about building transparency into decision-making processes, schools often share results of PB with student, other educators, and with PBP!

That's why we recommend deciding early how data will be stored and managed. In addition to thinking about how you might want to share the data you collect, you should also consider how you'll be collecting the data. If you are using digital data management like saving digital copies of everything on your computer or on cloud-based services but plan to do evaluation on paper, then you will need to account for the time it takes to enter the paper data into a digital format to keep everything in the same place. Paper evaluations with mostly digital data management will require data entry or scanning whereas digital data can be more easily integrated. However, digital data collection is not always the most accessible. Consider the context of your school and district and the goals of your PB process, and then decide what the best option is for your school PB evaluation.

Share your data or findings with us by contacting info@participatorybudgeting.org! We can use this information to improve the survey tools we recommend and to search for trends across school PB processes.





We're Here to Help!

Participatory Budgeting Project is the foremost expert on participatory budgeting in North America. We are a nonprofit organization that works across the US and Canada to empower people to decide together how to spend public money.

We provide technical assistance and training to implement successful PB processes and campaigns, develop new tools and resources to make PB better, and host panels, webinars, and information exchanges to share best practices. We have supported over 76 cities and institutions to launch PB, and our work has enabled 623,068 people to decide how to invest nearly \$300,000,000 in public funds.

To learn more about PB or to request support with starting a PB process in your community, email us at info@participatorybudgeting.org



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