Change From Within

A Guide to Running Participatory Budgeting in Your Organization

PART 2: Implementing PB

DEMOCRACY BEYOND ELECTIONS

pbp PARTICIPATORY BUDGETING PROJECT

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*See "Part 1: Advocating & Planning for PB" for an
introduction to this toolkit and the PB process.*

About this Guide

Have you ever wondered what sharing real decision-making power could look like within your organization? Or do you already use democratic practices internally, but want to turn those practices into budgeting action?

This guide is designed to help groups and organizations implement PB internally, with members, staff, partners, donors, and other organizational stakeholders. The information presented here reflects lessons learned from eight years of implementing an internal PB process at the Participatory Budgeting Project (PBP). On the following pages, you'll find resources to guide you through the process of advocating for, planning, and implementing PB in your organization, from deciding what goals you'd like to accomplish with PB to evaluating a process once it's done.

Practicing PB internally is one way for organizations committed to racial and social justice to live their values. PB isn't just about coming up with new ideas for spending money. Run the right way, it can be a powerful tool for redistributing power, regardless of participants' formal roles inside or outside of your organization. Redistributing power with PB can help disrupt organizational practices that exclude and oppress people, including Black people, Indigenous people, people of color, poor and working class people, trans and gender non-conforming people, and disabled people. It can also create more equitable, effective, and transparent spending decisions; develop new leaders; and build people's capacity for democratic decision-making.

This guide is an initiative of Democracy Beyond Elections, a collaborative campaign anchored by the Participatory Budgeting Project, which seeks to deepen participatory democracy and civic engagement, beyond and between elections. The core principle of Democracy Beyond Elections is community-led decision-making power that is equitable, accessible, and significant. As we grew this campaign and deepened relationships, our partners identified a need for more opportunities to exercise participatory democracy internally, so that they could become more effective advocates for it externally. This guide is a direct result of that feedback. PS: This guide is divided into two parts. Part 1 is focused on advocating and planning for PB in your organization; this part is all about how to implement PB once you're ready.

❯ **For more information, visit democracybeyondelections.org**
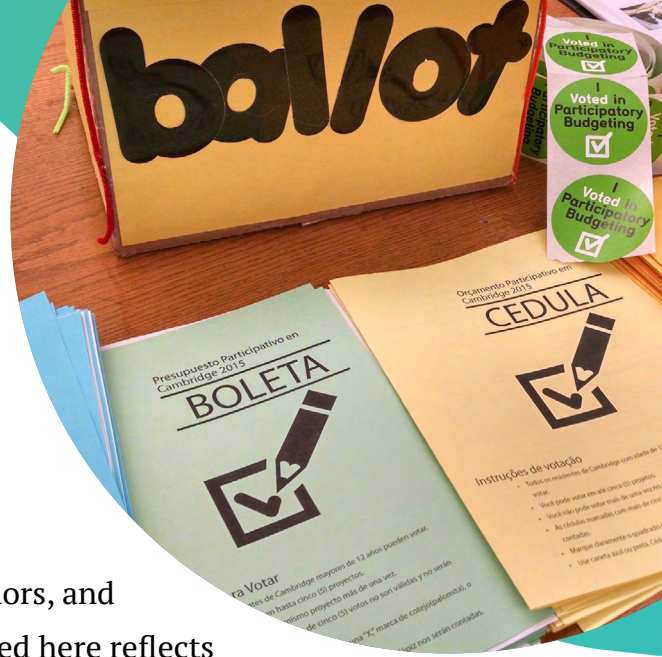
Implementing PB

Phase 1: Design the Process

STEP 1: Set your budget + timeline

Check list

❏ Identify funding

❏ Figure out your timeline

Details	Decision points

Identify funding

This step might come before you've recruited your Steering Committee–but ideally, a broad range of staff will be involved in identifying and confirming the funding you'll use. Your desired outcome might determine the funding you use for PB—for example, if it's about donor engagement, you could use a % of unrestricted donations. You'll also want to figure out how to account for PB in your organization's budget, and how much money you'll need to run the process itself. (You can run PB without spending any money on materials—but you should account for the cost in staff time.)

Assigned to: PB Coordinator, with feedback from management and other staff

- *What funding will we use for PB? (Discretionary/ unrestricted funds, individual donations, others?)*

- *How will PB be accounted for in our organization's budget?*

- *Do we need any funding for the process itself? How much staff time can we budget for this?*

- *Is the funding we're using sustainable to use in the long run, or will we need to find new sources of funding for future cycles of PB?*

- *Does the amount of money we're allocating feel significant enough?*

- *How will PB line up with our org's budgeting cycle and process?*

Figure out your timeline

Make sure you give yourself enough time to carry out a thorough and accessible process. Consider how PB will line up with other organizational processes and events, like your budgeting cycle, conferences, and fundraisers. Start out by planning for when you want folks to vote, and work backward from there.

Assigned to: *PB Coordinator and Steering Committee, with feedback from management and other staff*

› **Key resources: Sample Timeline**

- *How much time do we need for the entire PB process?*

- *Do we want activities like idea collection and voting to line up with key dates (like conferences, assemblies, fundraisers, or other events)?*

STEP 2: Build your team

Check list

❑ Identify a PB Coordinator

❑ Promote the process

❑ Brief staff, board, members, and other key stakeholders on opportunities and expectations

❑ Assess who needs to be on the Steering Committee

❑ Recruit + onboard Steering Committee members

Details	Decision points

Identify a PB Coordinator

This person coordinates between the Steering Committee, organizational leadership, program staff, and administrative and communications staff. They're also responsible for making PB happen on an agreed-upon timeline.

Assigned to: *Staff, including (but not limited to) organizational leadership*

- *Who will be our PB Coordinator?*

- *What needs to be in place to make sure this person has the authority and resources to do the job?*

Promote the process

Once you've decided to do PB, it's time to get the word out to your organization. You can make a presentation at a staff/ membership meeting, share resources from *participatorybudgeting.org,* or come up with other creative ideas for getting people excited.

Assigned to: *PB Coordinator, with help from management and other staff*

- *How will we educate folks about PB and get them excited?*

- *How will we make sure we're engaging people who haven't historically been represented in organizational decision-making and/or budgeting?*

Brief staff, board, members, and other key stakeholders on opportunities and expectations

It's really important that everyone involved in the process understands what they're consenting to.

- *Do people in our organization's leadership understand and consent to sharing their power?*

- *Do staff understand and consent to the impacts the PB process might have on their work?*

Assess who needs to be on the Steering Committee

The Steering Committee will oversee the process and make important decisions about how it works, including who is eligible to participate and what kinds of projects are eligible for funding.

For PB to create equity and be inclusive, the Steering Committee must represent (or over-represent) people who are excluded or marginalized in decision-making and budgeting. The specifics of what this looks like will vary across organizations and communities, but it should involve assessing how people from historically underrepresented and marginalized communities can be centered as decision-makers—that includes Black and Indigenous people, people of color, poor and working class people, trans and gender non-conforming people, and people with disabilities. You should also make sure that people from all parts of your organization are represented, not just people in management or leadership. Finally, make sure to be inclusive of people of the geographies and communities your organization works in.

- *Who needs to be represented on the Steering Committee in order for it to represent people who are excluded or marginalized?*

- *Who needs to be represented in order for it to represent our organization as a whole and the communities we work in?*

Assigned to: *PB Coordinator, in deep collaboration with the organization's staff*

Recruit + onboard Steering Committee members

Once you've decided who needs to be represented on your Steering Committee, recruitment can begin. It can be helpful to do both targeted recruitment and an open call—this can help create a more transparent process. You should also figure out if you will pay any volunteers who serve on the Steering Committee (or compensate them in another way).

Assigned to: *PB Coordinator, in deep collaboration with the organization's staff and other stakeholders*

- *How will we recruit Steering Committee members?*

- *How often will the Steering Committee meet?*

- *Are there members of the Steering Committee who aren't being compensated to do this work as part of their job? If so, will they be paid or receive other benefits for their contributions?*

STEP 3: Write the rules

Check list

- ❑ Decide how the Steering Committee will make decisions together
- ❑ Decide what goals you want to accomplish with your PB process
- ❑ Decide which metrics you will use to figure out if your process was successful
- ❑ Decide who will be eligible to participate
- ❑ Decide what criteria projects need to meet
- ❑ Decide the rules for voting
- ❑ Write your PB Rulebook

Details

Decision points

Decide how the Steering Committee will make decisions together

It's a good idea to agree on how you will make decisions as a Steering Committee before you get to work. Options include: by consent, consensus, or a majority vote.

Assigned to: *Steering Committee*

- *How will we make decisions?*

Decide what goals you want to accomplish with your PB process

What goals do you want to accomplish with PB? Is there a particular part of your organization's work you're hoping to change or improve? This is also the time to create explicit goals for creating an equitable and inclusive process. Write down your goals, so you can evaluate the success of the process at the end.

Assigned to: *Steering Committee, with feedback from staff/members*

› **Key resources: Sample Goals**

- *What are we hoping to change or improve with PB?*

- *What goals do we have for creating an equitable and inclusive process and outcomes?*

Decide which metrics you will use to figure out if your process was successful

Part of figuring out whether or not your process was successful will be figuring out how well you met the goals you outlined above. There may be other metrics that will help you define success, like generating a certain number of ideas, or getting a certain percentage of your organization to vote.

Assigned to: *Steering Committee*

- *How will we know if we've achieved our goals?*

- *Beyond our goals, what other metrics will help us evaluate whether or not our PB process was successful?*

- *What does a successful idea collection phase look like? How many ideas do we want to collect? Who do we want to collect ideas from?*

- *What does a successful voting process look like? What percentage of our organization or do we want to vote?*

Decide who will be eligible to participate

Consider who can propose project ideas, who can vote on projects, and who will help review project ideas and turn them into feasible proposals.

Assigned to: *Steering Committee, with feedback from staff/members*

- *Who will be eligible to propose project ideas?*

- *Who will help review project ideas to make sure they're feasible?*

- *Who will be eligible to vote on projects to fund?*

Decide what criteria projects need to meet

The key to getting feasible project ideas is creating specific and clear criteria for people to follow. Giving examples of good and bad projects is an effective way to give participants guidance. Providing participants with resources to estimate project costs can also help them create realistic proposals.

Assigned to: *Steering Committee, with feedback from staff/members*

- *Are there restrictions on how the money can be spent? What are they?*

- *Are there other criteria we want to follow—like making sure resources are spread equitably between departments, or are focused on a particular theme or need?*

- *How many projects should the funding be split between?*

- *How will we assess if an idea is feasible and who needs to be a part of that process?*

Decide the rules for voting

You need to make decisions about how voting will work (and what will happen if special circumstances arise) before the process starts. You should decide:

- If voting will happen online, in person, or both

- How long people will have to vote

- How many projects will be selected for the ballot

- What will happen if two or more projects receive the same number of votes

Assigned to: *Steering Committee*

Write your PB Rulebook

Write down the rules your Steering Committee decides on and make them accessible to your entire community. Include information on who is eligible to participate, project eligibility, how to propose projects, and how to vote.

Assigned to: *Steering Committee*

› **Key resources: Sample Rulebook**

- *How will we let participants know about the PB Rulebook and where to find it?*

- *How will we hold each other accountable to honoring the decisions reflected in the rulebook throughout the process?*

- *What will we do if something in our Rulebook needs to change?*

STEP 4: Make an evaluation plan

Check list

❑ Figure out what information and feedback you'll need to evaluate the process

❑ Make a plan for collecting the information you need over the course of the PB process

Details	Decision points

Figure out what information and feedback you'll need to evaluate the process

For example, if you want to measure whether increased engagement with people who have been excluded from organizational decisions in the past, you might want information on how budget decisions have been made historically, information on who participated, and feedback from participants on how they felt about their role in the process.

Assigned to: *PB Coordinator and Steering Committee, with support from staff*

- *Is the information we need readily available, or will we have to create tools to collect it?*

- *Will we collect demographic information from participants? (This can help you understand who participates in idea collection and voting; it's also important to think through how you will handle info confidentially.)*

- *How will we get feedback from participants?*

Make a plan for collecting the information you need over the course of the PB process

By planning for evaluation before the process starts, you can make sure you don't miss important opportunities to collect information and feedback.

Assigned to: *PB Coordinator and Steering Committee, with support from staff (who may need to help carry out the work of evaluation after the process is over)*

› **Key resources: The 6Ms of PB Evaluation**

- *At what points in the process do we need to collect information?*

- *How will we store information and make sure it's accessible to people in the future?*

Phase 2: Collect Ideas

Check list

- ❏ Create your idea submission form
- ❏ Plan to recruit Budget Delegates
- ❏ Collect ideas at events or meetings
- ❏ Collect ideas with a form or email

Details

Create your idea submission form

You'll need an easy-to-use form that people can fill out to submit their ideas online. It should also give a little bit of background on the process, as well as any criteria people should keep in mind as they come up with ideas (maximum budget, topic area, etc.). You might also want to make a printed form available (you can hand it out at events or even mail it to participants—with return postage!).

Assigned to: *Steering Committee*

❯ **Key resources:**
   Sample Idea Submission Form

Decision points

- *How will we collect ideas? (online, printed form, both)*

- *What information and guidance will people need to generate good ideas?*

- *Will we collect contact information from people who propose ideas, so we can follow up if you need to?*

Plan to recruit Budget Delegates

Budget Delegates help vet and rank ideas, turn ideas into proposals, and help create project descriptions for the ballot. A good time to recruit Budget Delegates is during the Idea Collection phase—you can put out the call for volunteers along with your idea collection outreach, and even include it on your idea submission form. Budget Delegates will meet several times throughout the Proposal Development process.

Assigned to: *Steering Committee*

- *How many Budget Delegates do we need? (Start by considering how many projects you want to appear on the ballot—each Budget Delegate can help develop 1-2 proposals in the span of a few meetings.)*

- *Can we pay Budget Delegates for their participation? Are there other ways we can recognize their support?*

- *What support will Budget Delegates need? Who will provide the support?*

- *Who will be responsible for communicating with Budget Delegates and facilitating their meetings?*

Collect ideas at events or meetings

Collecting ideas at events or meetings is effective because members of the Steering Committee can be available to answer questions on the spot and help participants come up with their best thinking. (In-person is great, but you can make it work during virtual meetings, too.) You can schedule the idea collection phase to line up with meetings you already have planned (or use it as an excuse to throw a party!). Use the information recorded in your Rulebook to help participants understand what projects are eligible.

Assigned to: *Steering Committee*

- *At which meetings/events will we collect ideas?*

- *Who from the Steering Committee can help facilitate idea collection and answer questions?*

- *How will we physically collect ideas? (On paper? Digitally?) Where will we store ideas?*

- *How will we ensure all eligible participants have time and access to idea collection processes?*

Collect ideas with a form or email

Since not everyone may be able to participate in idea collection events, giving folks the opportunity to submit ideas with a simple form or via email is a good idea, too.

Assigned to: *Steering Committee*

- *How will we collect ideas? (Via email? Via a digital form?)*

- *Who from the Steering Committee can help process online submissions and make sure they get stored correctly?*

Phase 3: Develop Proposals
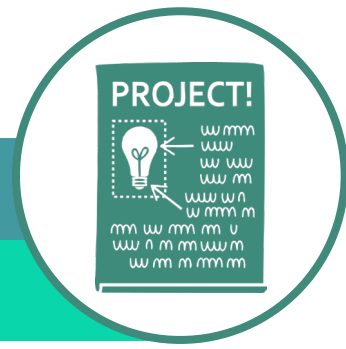
STEP 1: Create your shortlist

Check list

❑ Review ideas against eligibility criteria

❑ Rank ideas

Details	Decision points

Review ideas against eligibility criteria

The Steering Committee should review each idea to make sure it meets the eligibility criteria in your PB Rulebook. You can also flag similar ideas so Budget Delegates can consider combining them into one proposal.

Assigned to: *Steering Committee*

- *If we run into a gray area, how will we make collective decisions about whether or not an idea is eligible?*

- *How will we record notes that reflect the Steering Committee's initial review? How will we make those notes accessible to others?*

- *Will we respond to ideas that don't meet eligibility criteria?*

Rank ideas

Budget Delegates should rank each eligible idea, using how strongly it meets the eligibility criteria as a guide. Next, Budget Delegates and the Steering Committee should decide together how many ideas is feasible for the group to develop into proposals. They can use that information to create a cut-off threshold for which ideas will move forward..

Assigned to: *Budget Delegates, with support from the Steering Committee*

- *Where will Budget Delegates rank ideas and store their feedback?*

- *How many project ideas do we want to appear on the final ballot?*

- *Who can help answer questions if they come up?*

❯ **Key resources: Idea Ranking Tool Sample Idea Ranking Spreadsheet**

Check list

❑ Recruit staff/members to participate in feasibility review

❑ Do a feasibility review with relevant staff/member reviewers

❑ Get other staff/members to weigh in

Details	Decision points

Recruit staff/members to participate in feasibility review

For each idea that moves on, you'll need:

- Staff/member reviewers: They vet ideas, give feedback on technical issues and revisions, and give cost estimates. Reviewers should have expertise in the area that the project relates to. Ideally, they're also the people who will help implement the project if it wins.

- Budget Delegates: They help turn project ideas into the final project proposals that go on the ballot (including project name, description, and cost). The person who proposed a project idea doesn't have to be its assigned Budget Delegate, but they could be.

(These roles can also be filled by Steering Committee members. Either way, make sure that you're consulting with the people that will be implementing or impacted by the work down the road, and giving folks who aren't on the Steering Committee the opportunity to participate.)

Assigned to: *Steering Committee*

- *How will we recruit staff/members to help review ideas?*

- *How will we make sure staff/members who might be impacted by a particular idea are involved?*

Do a feasibility review with relevant staff/member reviewers

Have staff and members give their opinion and advice on the project idea.

If the idea isn't feasible in its current form, what's the need that underlies the proposal? How can the proposal be tweaked to meet that need and be feasible?

Assigned to: *Staff/members, with help from the Steering Committee*

- *How much time should be dedicated to idea review?*

- *How will participants provide feedback and record their notes?*

- *How will we help impacted staff/members feel empowered to give constructive feedback, rather than just reject ideas?*

- *How will we respond to ideas that don't move forward in the process?*

Get other staff/members to weigh in

Engage a broader group of staff/members in giving feedback on ideas.

If the staff who will be responsible for implementing projects haven't been involved in review yet, make sure they have a chance to review at this point.

Assigned to: *Staff/members, with help from the Steering Committee*

- *How will staff/members provide feedback and record their notes?*

Check list

- ❑ Work with Budget Delegates to draft final project proposals
- ❑ Do a final review of project proposals

Details	Decision points

Work with Budget Delegates to draft final project proposals

For each idea that moves on, ask a Budget Delegate to draft a detailed description of the project that incorporates the feedback that emerged from the review process, including a cost. They may need to work with Steering Committee members and other relevant staff to fill in and confirm details and cost estimates. They should also give each proposal a clear and compelling title. If the proposal has changed substantially from the initial idea that was submitted, the Budget Delegate may want to check back in with the person who originally proposed the idea to see if they have any final feedback.

Assigned to: *Budget Delegates, with help from the Steering Committee*

› **Key resources: Proposal Development Overview, Project Proposal Template**

- *How will we support Budget Delegates as they draft project proposals?*

- *Where will we collect and store project proposals?*

- *What info will they need to draft proposals?*

- *Will we need to loop in certain staff to provide expertise?*

Do a final review of project proposals

Steering Committee and impacted staff members should review project proposals one last time to make sure they still meet eligibility criteria and are feasible.

Assigned to: *Steering Committee*

Phase 4: Vote

STEP 3: Draft final proposals

Check list

- ❏ Create your ballot
- ❏ Promote the voting process
- ❏ Get out the vote!
- ❏ Tally the votes
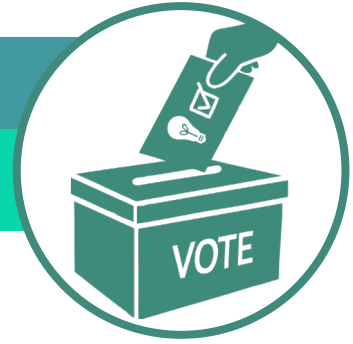
Details

Decision points

Create your ballot

Your ballot should give voters the information they need to make their decision—including how many projects they can vote for or dollars they can allocate. You may want to create both printed and digital ballots. As you design your ballot, make sure that there's consistency across projects in terms of detail and tone (you don't want to unintentionally privilege one project over another with a more detailed description). You should also decide whether to add an optional survey that captures voter demographics or other information that could help you evaluate your process..

Assigned to: *Steering Committee and Budget Delegates*

❯   **Key resources: Sample ballot, Voting Systems Overview**

- *Will participants vote with paper ballots or online (or both)?*

- *Do we want to ask voters to answer demographic or other questions?*

- *How will we ensure voting is equitable and accessible?*

- *What languages do we need to create ballots in?*

Promote the voting process

Let people know when and how to vote. Be sure to promote projects equally so that you don't create unintended bias.

Assigned to: *Steering Committee, with help from staff/members*

- *How will we maximize participation in the voting process?*

Get out the vote!

Voting can happen at special events (like fundraisers or member assemblies), and on its own.

Assigned to: *Everyone who's eligible to vote!*

- *How will we kick off the voting process?*

Tally the votes

Assigned to: *Steering Committee*

Phase 5: Implement Winning Projects

STEP 1: Celebrate!

Check list

❑   Announce the winners

Details	Decision points
Announce the winners	
Promote the winning projects and celebrate the work that went into a successful process! **Assigned to: _Steering Committee_**	• _How will we let people know about winning projects?_

STEP 2: Plan for implementation

Check list

❑   Connect with staff/members responsible for implementing projects

❑   Make a plan for monitoring winning projects

❑   Make a plan for updating staff/members on project progress

Details	Decision points

Connect with staff/members responsible for implementing projects

Work with impacted staff to figure out how they'll integrate the project into their work plan. Identify any support they'll need to carry out the project. Create clear expectations for how folks will stay accountable to the project plan.

Assigned to: *Steering Committee in collaboration with staff/members*

- *How will winning projects get integrated into our organization's and individual staff work plans?*

Make a plan for monitoring winning projects

Decide how you'll track project progress and at which point you'll check back in on how things are going.

Assigned to: *Steering Committee in collaboration with staff/members*

- *How will we keep track of projects and their progress?*

Make a plan for updating staff/members on project progress

Regular updates create accountability and keep everyone engaged in the process. You can include these in internal communications, in meetings, or in the digital spaces your organization uses to share information.

Assigned to: *Steering Committee in collaboration with staff/members*

- *How will we update people on project progress?*

Phase 6: Evaluate

STEP 1: Celebrate!

Check list

- ❏ Assess what went well and what can be approved

- ❏ Start planning for next year!

Details

Decision points

Assess what went well and what should be improved the next time around

Using the information you collected as part of your evaluation plan, assess which goals you met and where you fell short. Dedicate time for the Steering Committee to have a detailed debrief together (and to share their own thoughts and reflections). You can also invite Budget Delegates to share their feedback with a survey or in a debrief meeting.

Assigned to: *Steering Committee*

- *How will we share what we learned in our evaluation?*

Start planning for next year!

Using the lessons learned from the evaluation, start thinking about a timeline and plan for your next PB cycle. Make sure to record Steering Committee recommendations for future cycles.

Assigned to: *Steering Committee*

- *How can we turn what we learned this year into meaningful changes for next year?*

- *How can we integrate PB into other parts of our work—as part of leadership development, capacity building, etc.?*

- *Is the budget we allocated with PB available next year, or do we need to find a new source of funding? Did the budget feel significant enough, or should we dedicate more funding?*

- *What else can we do to make sure PB is sustainable for our organization in the long run?*

Putting it All Together

Challenges with Implementing PB

Even the best planned and resourced PB processes have challenges. (At PBP, we encounter new challenges with each PB cycle we run, and we're always in the process of refining our approach!) Here are some of the challenges we've identified, organized by the phase of the process, and with suggestions for how to approach solving them. And remember that this guide provides a framework for implementing PB in your organization—you can adapt what you see here in a way that works for your org!

Staff, members, and/or other stakeholders who aren't on the Steering Committee feel out of the loop	• Can you provide more regular updates on the process? • Have you planned for staff, members, and other key stakeholders to participate in a feasibility review of ideas? • Is there a regular meeting or digital space where you can share updates?
People are concerned about their capacity to participate	• Be very clear about what's required to participate in different phases in the process, so people have realistic expectations. • Have conversations about capacity up front and see if it's possible to shift things to support participation. • Consider offering stipends to people who need them to participate.
Your Steering Committee isn't big or diverse enough	• Think through any barriers to participation. Have you clearly explained what's expected of committee members? • Do you have clear guidelines for the diversity you want to see reflected in the committee? • Can you work with participants to offload some work in order to participate?

You have trouble generating enough ideas

- Brainstorm ways to expand your outreach. Could you integrate an idea collection into an upcoming staff or member meeting?

- Could you collect ideas in a variety of ways and spaces? Some people do better brainstorming independently or in writing, while others find it generative to be in conversation with others.

- Does data already exist? Maybe you've already surfaced some things that the organization needs, and you could bring those into the conversation?

- Could you brainstorm with specific themes or focuses in mind, if people need more guidance?

Many ideas don't meet eligibility criteria

- Check the wording of your eligibility criteria–is it simple and easy to understand? Have you made your eligibility criteria easy to find (in your outreach emails, on the idea collection form)?

- Do you need to adjust your eligibility criteria to make it more useful, actionable, or realistic?

- Can you identify an underlying need that the idea gets at? Could a proposal be developed that meets that need?

You have trouble recruiting Budget Delegates

- Reflect on your recruitment strategy—are there people you know who are excited about your work, but don't know how to engage? Can Steering Committee members do some one-on-one outreach?

- Could you offer a stipend to incentivize participation and support participants?

Budget Delegates aren't as engaged as you'd like them to be

- Ask Budget Delegates what they need to help them participate.

- Consider assigning Steering Committee members as "buddies" to build relationships with budget delegates and provide support.

You have trouble getting people to vote

- Brainstorm ways to expand voter outreach.

- Can you integrate voting into existing meetings and/or events? (In meetings, make your icebreaker a ballot review, and then use your check out time for voting!)

Staff have concerns about implementing winning projects

- Create the time and space you need to address concerns. Is there a way to honor the winning project proposal while making changes to make it feasible?

- Conducting an open and thorough feasibility review with staff is the best way to ensure winning projects can be implemented. Make a plan for how this will happen in your next cycle.

There's confusion over how or when a project should happen

- As soon as winning projects are announced, be sure to set up project kick-off meetings with impacted staff. That way, everyone can get on the same page about accountability for the project, timeline, and other key details.

You're at the end of your process and not sure what you can or should evaluate

- Planning for evaluation early in your process is the best way to make sure evaluation happens and the data you collect is useful. What steps can you take now to make an evaluation plan for the next cycle?

Let's Build This Together

When we make decisions together, we make decisions that are better. We hope this guide can help your organization share power in a way that affirms the value of all participants—and results in innovative projects that increase and expand your impact.

We also recognize that this guide is really a framework. Your organization will change and adapt what's here to meet your unique situation. And don't forget, PB isn't a one-off thing—you'll learn a lot from running your first PB cycle, and you can use what you learned to improve future cycles.

Finally, we would love to hear from you about what you learn on your PB journey! Your feedback and insight will help us engage more organizations in practicing participatory democracy internally—and it will help us create practices that are more radically equitable, accessible, inclusive, and transformative than we can create on our own.

Reach out to info@participatorybudgeting.org to share your story or questions.

Acknowledgements

On the following pages, you will find some additional resources that will help you plan and implement PB within your organization. And don't forget, PB isn't a one-off thing—you'll learn a lot from running your first PB cycle, and you can use what you learned to improve future cycles.

APPENDIX A
Checklist for Implementing PB

PHASE 1: DESIGN THE PROCESS

STEP 1: Set your budget + timeline
❑ Finalize funding

❑ Figure out your timeline

STEP 2: Build your team
❑ Identify a PB Coordinator

❑ Promote the process

❑ Brief staff, board, members, and other key stakeholders on opportunities and expectations

❑ Assess who needs to be on the Steering Committee

❑ Recruit and onboard Steering Committee members

STEP 3: Write the rules
❑ Decide how the Steering Committee will make decisions together

❑ Decide what goals you want to accomplish with your PB process

❑ Decide which metrics you will use to figure out if your process was successful

❑ Decide who will be eligible to participate

❑ Decide what criteria projects need to meet

❑ Decide the rules for voting

❑ Write your PB Rulebook

STEP 4: Make an evaluation plan
❑ Figure out what information and feedback you'll need to evaluate the process

❑ Make a plan for collecting the information you need over the course of the PB process

PHASE 2: COLLECT IDEAS

- ❑ Create your idea submission form
- ❑ Plan to recruit Budget Delegates
- ❑ Collect ideas at events or meetings
- ❑ Collect ideas with a form or email

PHASE 3: DEVELOP PROPOSALS

STEP 1: Create your shortlist

- ❑ Review ideas against eligibility criteria
- ❑ Rank ideas

STEP 2: Do a detailed feasibility review Checklist

- ❑ Recruit staff/members to participate in feasibility review
- ❑ Do a feasibility review with relevant staff/ member reviewers
- ❑ Get other staff/members to weigh in

STEP 3: Draft final proposals

- ❑ Work with Budget Delegates to draft final project proposals
- ❑ Do a final review of project proposals

PHASE 4: VOTE

- ❑ Create your ballot
- ❑ Promote the voting process
- ❑ Get out the vote!
- ❑ Tally the votes

PHASE 5: IMPLEMENT WINNING PROJECTS

STEP 1: Celebrate!

- ❑ Announce the winners

STEP 2: Plan for implementation

- ❑ Connect with staff/members responsible for implementing projects
- ❑ Make a plan for monitoring winning projects
- ❑ Make a plan for updating staff/members on project progress

PHASE 6: EVALUATE THE PROCESS

- ❑ Assess what went well and what could be improved
- ❑ Start planning for next year!

APPENDIX B
Templates & Resources for Implementing PB

Advocating for PB
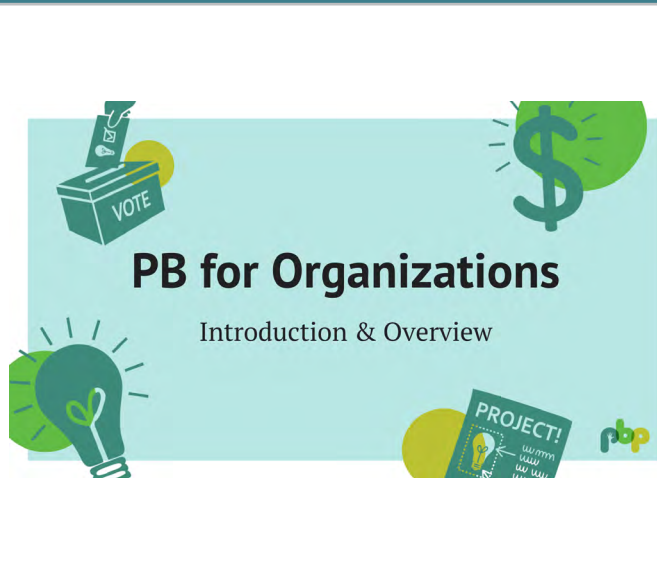
PB for Organizations Introduction & Overview

Use the slides in this deck to explain what PB is and spark a conversation about bringing it to your organization. This slide deck also includes a detailed timeline of how PB happens internally at PBP.

Design the Process

Sample Rulebook

This is an example of a rulebook for a PB process (pulled from PBP's 2020 cycle).

Brainstorm Ideas

Sample Idea Submission Form

This is an example of a form used to collect ideas.

Develop Proposals
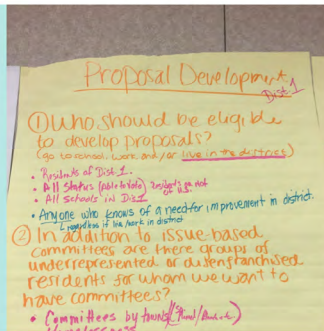
Proposal Development Overview

This slide deck introduces the Proposal Development process, including information on how to recruit and support Budget Delegates, and suggestions for ranking and sorting ideas. (This presentation could be adapted to help orient Budget Delegates to their roles.)

Idea Ranking Tool

This is an example of a tool that can help Budget Delegates review, research, and rank ideas.

Sample Idea Ranking Spreadsheet

This is another example of a tool that can help Budget Delegates review, score, and rank ideas consistently.

Project Proposal Template

A simple template that helps guide Budget Delegates in turning an idea into a full proposal.

Vote

PB Voting Systems Overview

This slide deck gives an overview of common voting systems to choose from, as well as some options for digital voting platforms.

PB Ballot Samples

Use these examples to jumpstart ballot design. They will also give you an idea of what final project descriptions could look and sound like.

Evaluate the Process

The 6 Ms of PB Evaluation

This document lays out key questions to ask as you craft your evaluation plan.
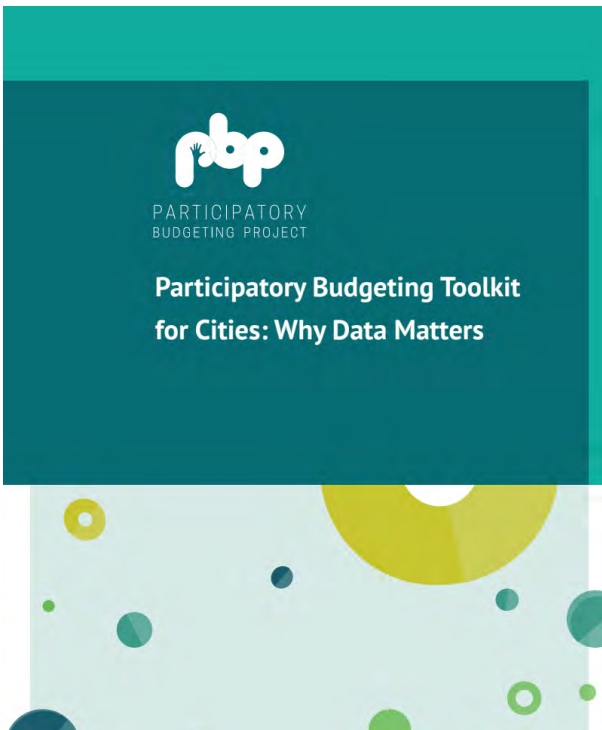
PB Evaluation Toolkit for Cities

This toolkit gives an overview of best practices for evaluating a PB process. (It's designed for PB in local governments, but has lots of info that is applicable to organizations, too.)