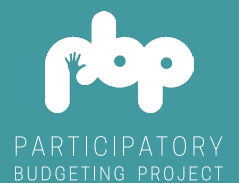




# Change From Within

A Guide to Running Participatory Budgeting in Your Organization

**PART 1: Advocating & Planning for PB**



# Table of Contents

## 3 About This Guide

## 4 What is PB?

7 What can your organization achieve with PB?

8 PB in action

10 Envisioning outcomes

## 12 Laying the groundwork for PB

13 Getting ready for PB

19 Generating interest in PB

21 Working through common questions

25 Let's build together

*See “Part 2: Implementing PB” for detailed step-by-step information and resources on implementing a PB process.*

*Image credit - cover photo: Alison Boulier, City of Vancouver Participatory Budgeting Process*

# About this Guide

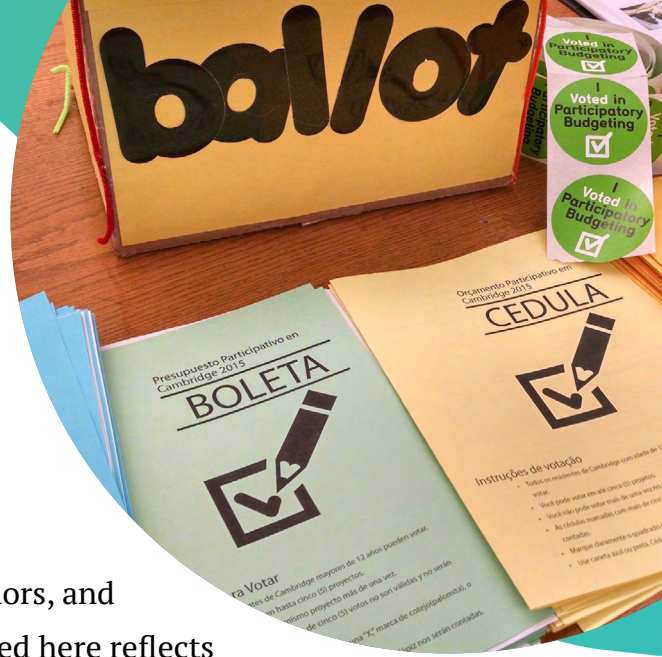
**Have you ever wondered what sharing real decision-making power could look like within your organization? Or do you already use democratic practices internally, but want to turn those practices into budgeting action?**

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. This part is focused on advocating and planning for PB in your organization; Part 2 is all about how to implement PB once you're ready.

› **For more information, visit [democracybeyondelections.org](https://democracybeyondelections.org)**



The image features a white background with two large, overlapping teal shapes in the corners. One shape is in the top right, and the other is in the bottom left. They appear to be parts of a larger circle or a similar curved shape.

**What is PB?**

# Participatory budgeting—or “PB”—is a democratic process for sharing decision-making power within your organization.

In the PB process, community members decide together how to spend part of a budget. When PB is planned with equity and accessibility in mind, it has the power to generate decisions that are more equitable and inclusive than the “status quo.” If you’ve heard about PB before, it was probably in the context of a city or government initiative. But PB can work for nonprofit organizations, too. A typical PB process follows these steps:



PB has been applied to thousands of budgets in the U.S. and around the globe, including city, county, state, and federal budgets; discretionary funds of elected officials; and school, school district, and university budgets. But PB can be applied to budgets of all kinds, including non-profit budgets. PB doesn’t require new revenue streams—it works with the budget you already have, making spending more effective and equitable at the same time, and PB can be a helpful tool for transparency and creative solutions in the face of hard budget decisions



CHECK OUT THIS VIDEO TO SEE PB IN ACTION:  
This awesome video was made with funds from our internal PB process!



# What Can Your Organization Achieve with PB?

When designed and implemented with equity, accessibility, and impact in mind, PB can help your organization achieve these outcomes:

## Shared decision-making power



PB is a process for sharing decision-making power across your organization. When designed with accessibility and equity in mind, PB can reach people who face barriers to participation, including those who haven't been included in organizational decisions in the past. It's also an opportunity for organizations to practice democratic decision-making.

## More equitable and effective spending



Because staff, members, and other stakeholders are directly involved in decision-making about how to spend a given budget, spending becomes more responsive to their needs. Even ideas that aren't ultimately funded become a resource for the organization, cueing leadership to needs that they might not have known existed.

## Increased engagement



Participants can see the tangible results of their participation, which can ignite them to become more involved in the organization. PB is also a strategy for increasing donor engagement and an opportunity to learn about participatory democracy.

## Opportunities for leadership development



There are many opportunities for leadership in PB, from joining the Steering Committee to being a Budget Delegate. Participants can gain valuable skills, like public speaking, negotiation, and facilitation.

# PB in Action!

**One of the best ways to help folks understand what PB is and get them engaged and excited is to show them how their participation will result in real projects that impact your organization.**

Each year at the Participatory Budgeting Project (PBP), staff, partners, and supporters have the opportunity to propose ideas for how to spend a portion of our organization’s individual donations. Then individual donors (of any amount) get to vote on winners. Here are some of the winning projects from PBP’s internal PB process:



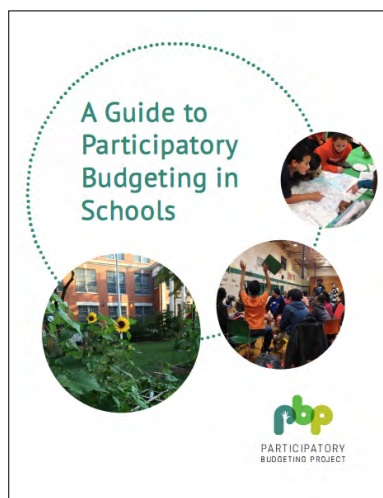
## PBP Team “Treat YoSelf” (2021)

This initiative will resource the amazing PBP staff team in building a healthy, thriving, and supportive remote office culture.



## Conference Scholarships for Youth (2014)

This fund covered the travel costs for several young people to participate in the 3rd International Conference on PB in North America. Youth were able to develop leadership skills by participating, and all participants benefited from the perspectives of young people, who are often excluded from conference proceedings.

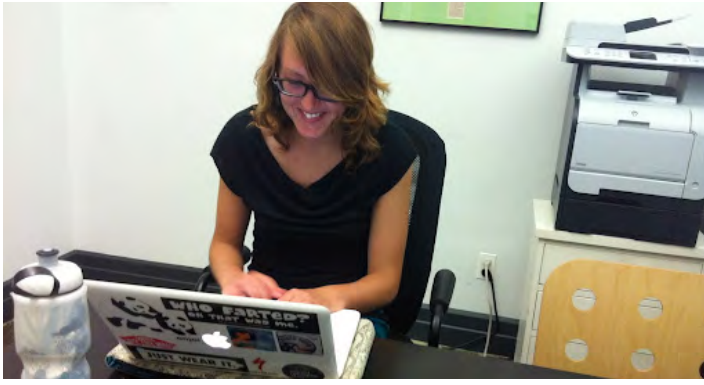


## Guide to PB in Schools (2015)

This free guide helps teachers integrate PB into their curriculum, supporting young people to be real decision-makers in shaping more supportive school environments.

› [Check it out here.](#)





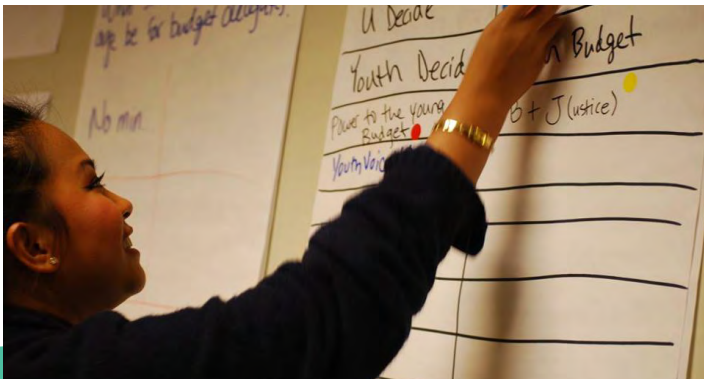
## PBP Computer Upgrade (2014)

New computers and upgrades to software and services helped PBP improve billing and increased its capacity to produce materials in-house.



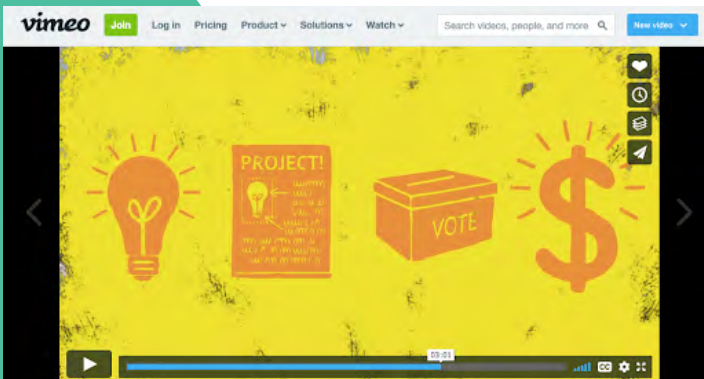
## Training & Public Talks Fund (2018)

This fund provided training and technical support to local advocates interested in starting a PB process. This helped PBP reach new partners who otherwise wouldn't have had the resources to work with us.



## Hiring a Part-Time Development Associate (2012)

An initial investment of \$4,000 enabled PBP to hire its first part-time development staff member, who raised funds so that we can better support our partners.



## PB Intro Video (2012)

This video shows the real faces, stories, and people power behind the process. PBP leveraged this initial \$5,000 investment into a \$15,000 award from the MacArthur Foundation, allowing us to tell the story of PB to a broader audience.

➤ [Check it out here.](#)

# Envisioning Outcomes

In addition to distributing power and shifting how decisions are made, PB can be designed to help your organization achieve different outcomes. Below are examples of this—they're meant to help your organization think big about what you'd like to achieve with PB (and the examples aren't mutually exclusive).

## Example 1: Broadening participation

**Scenario:** A statewide base-building organization has a core set of deeply engaged members, but staff have developed a strong hunch that current initiatives and programs might not reflect the needs of their broader membership. The organization wants to use PB as a tool for engaging a broader and more representative set of members in weighing in on the organization's operations.

**Participants:** All of the organization's staff, members, and leadership will be eligible to submit ideas. Any dues-paying member can vote. Specific outreach will be focused on members who have not engaged deeply with the organization in the past.

**Budget used:** A set amount of membership dues.

## Example 2: Practicing participatory democracy internally

**Scenario:** A national advocacy organization wants to become more deeply involved in participatory democracy practices, but staff see a need to strengthen the organization's commitment to democratic decision-making within before doing more external advocacy. The organization wants to use PB as a tool for practicing participatory decision-making and distributing power more equitably within their organization.

**Participants:** All of the organization's staff and leadership will be eligible to submit ideas and vote on winners. The Steering Committee that will design and oversee the process will be made up of at least 75% non-management staff.

**Budget used:** A set amount of the organization's unrestricted/discretionary funding.

## Example 3: Deepening supporter & partner engagement

**Scenario:** A local nonprofit wants to bring more community expertise into their work. They decide to use PB to deepen engagement with their network of community partners and other supporters who live in their community.

**Participants:** Anyone who lives, works, or goes to school in the community is eligible to submit ideas and vote. Specific outreach will focus on people from communities that are excluded and marginalized, including BIPOC communities and poor and low-income communities.

**Budget used:** A percentage of unrestricted institutional and individual donations received in the previous year.



The page features two large, solid teal shapes in the corners. One is a circular segment in the top right, and the other is a larger, irregular shape in the bottom left. The text is centered in a bold, teal font.

# Laying the Groundwork for PB

# Getting Ready for PB

**Is your organization ready for PB? Implementing a successful process takes planning and commitment from across your organization. Completing items on this list will help you lay the groundwork for a successful PB process.**

## Clarify your organization's reasons for doing PB

- What makes you excited about taking on PB? How do you hope participatory democracy will transform your organization? How will shifting power impact your work? Spell out the reasons PB fits with your organization's mission and vision—you can return to these reasons as a resource as the process progresses.

## Confirm your organization's commitment to shared decision-making power that is equitable, accessible, and significant

We advocate for doing PB within organizations because it's a concrete way of sharing decision-making power. Done right, it can make our organizations more equitable, inclusive, and effective. Making this commitment up front will create alignment on why doing PB is important.

- In order for PB to be equitable, accessible, and significant, all participants—and especially those who hold power within the organization—should consent to:
  - Prioritizing staff, members, partners, supporters, etc. who are traditionally excluded from decision-making spaces within the organization
  - Relinquishing power and control
  - Testing, implementing, and evaluating new models of shared governance.

## Have an honest conversation about how budgeting happens at your organization and identify ways to improve it

- Running a PB process is also an opportunity to engage in making decisions together about your organization's budget as a whole.
- If you start a PB process with a certain pot of money but don't address how the rest of your organization's budget is set, you risk creating a process that feels tokenizing and insignificant.
- Having honest discussions about how money works and who decides can feel uncomfortable—but it's one of the best ways we can create more equitable, inclusive, and democratic organizations. (It's also one of the best ways to set up your PB process for success!)



## *Here are some steps you can take to address budgeting at your organization:*

- Teach all staff—no matter what their role is—basic budgeting concepts and how to read an operating budget. This will give people the tools they need to engage with your org’s budget on their own.
- Explain each of the big steps in your budgeting process and identify who has decision-making power in each of them. (This might require you to clarify your process for yourself, if your organization’s budgeting process is less formal.)
- Have an honest conversation with staff about how to make your budgeting process better:
  - Where are the places that staff have input on the budget? Can you add more touchpoints for input, or make the touchpoints you have more significant?
  - Do people need more budget information? Can you work regular updates into staff meetings?
  - Do people need more accessible budget information? Can you visualize information with graphs or charts, or add annotations that help explain the numbers?

## Generate support & interest across your organization

- Explain what PB is and see if folks in your organization are interested in participating.
  - You also may need approval from your organization’s leadership to move forward. It’s critical that they understand and approve of the process—particularly the decision-making power they’re being asked to share. Leadership should also commit the time and resources needed to carry out PB up front (see below for more information).
- › **Check out “Advocating for PB” for resources that can help you make the case for PB at your organization.**

## Create a clear decision-making structure

If there are decisions that people in leadership will make about the process—like any specific restrictions on how the money can be spent, or by when it needs to be spent—be very clear about what those decisions are and who will make them up front.

## Confirm that there's funding available to work with

PB works with the budget you already have—you don't need a new source of funding to make it work. Be clear and specific about what budget you will use at the beginning of the process.

› See “[Envisioning Outcomes](#)” for examples of budgets that you can use.

## Dedicate staff/member capacity to organize and implement the process

Here are the key roles you'll need to fill. Some of the roles could be filled by the same person (for example, someone could be both a PB Coordinator and a member of the Steering Committee; a person on the Steering Committee might also provide staff support).



# PB Coordinator

*Coordinates the entire PB process*

### Responsibilities:

- Keeps participants accountable for completing the process on the agreed-upon timeline
- Coordinates between the Steering Committee, organizational leadership, program staff, and other stakeholders
- Attends all key meetings
- Helps the Steering Committee assign work and supports on key project tasks, as needed

### Considerations:

- *This is a big lift! The PB Coordinator will be coordinating and attending many meetings, interacting with stakeholders, and managing a lot of communication.*
- *With close and clear coordination, two people could fill this role.*
- *It's helpful for this person to have some project management experience.*



# Steering Committee Member

*Oversees the PB process and make key decisions about it*

## Responsibilities:

- Makes key decisions, like who is eligible to participate and what kinds of projects are eligible for funding
- Attends all key meetings
- Collectively responsible for the full range of activities, from creating communications to drafting the ballot
- Carries out process evaluation

## Considerations:

- *This is also a big lift! The Steering Committee will convene many times throughout the process (at least monthly, and sometimes bi-weekly or weekly) and will be called to provide support on a range of activities.*
- *This role is a great leadership development opportunity.*
- *The size of the Steering Committee can vary but it should ideally represent the full diversity of people you want to engage in your process.*



# Budget Delegate

*Prioritizes ideas and turns them into proposals*

## Responsibilities:

- Rates and prioritizes project ideas
- Turns top-ranked ideas into full project proposals
- Helps draft ballot text

## Considerations:

- *This role is great for someone who is interested in learning more about your work or experiencing a participatory democracy process like PB.*
- *Proposal development can happen over 2-3 formal meetings (sometimes more), and it will likely require outside prep and review time.*
- *The number of Budget Delegates can vary, but you should have enough participants to share the work of developing proposals in a manageable way.*



# Programmatic, Administrative & Communications Staff

*Support the process with feedback and expertise*

## Responsibilities:

- All staff and other stakeholders who could be impacted by potential projects should have the opportunity to review project ideas for feasibility
- Admin staff might be needed to support on logistics and scheduling
- Communications staff can help with promotion, outreach, and documenting the process

## Considerations:

- *Be clear about what will be required up front and give staff the opportunity to ask for support, if they need it.*



*Image credit: Alison Boulier, City of Vancouver Participatory Budgeting Process*

## Plan for time to carry out PB activities

Running a successful PB process takes time. You should plan for the entire process to take at least a few months (and you might need longer). Make sure to build any deadlines for spending PB funds into your process timeline.

- › **See Part 2 of the toolkit “Implementing PB” for a detailed outline of the PB process, including a sample timeline.**

## Confirm your organization’s commitment to implementing winning projects and evaluating the PB process

If your organization doesn’t implement winning projects, you’ll undermine your commitment to shared decision-making—and the entire PB process will lose credibility. In order to set the stage for implementation, you should have open conversations about what projects might mean for individual and team workloads. Evaluation is another critical part of establishing the credibility of PB within your organization. By assessing both the process itself and the projects that get funded, you can figure out how successful you were and plan changes for future cycles of PB.

## What you DON’T need for a successful PB process:

- **A new source of funding**—PB works with the budget you already have. Organizations regularly make decisions about how to focus time and resources. PB doesn’t require new money—it paves the way for new models of shared decision-making power across your staff and/or membership.
- **Lots of supplies or special technology**—The biggest cost associated with implementing PB internally is the time of staff, members, and/or supporters. A small supplies budget to cover printing and postage costs (if you plan to mail ballots) may be helpful. For online voting and project management, basic online tools (like Google Forms, Loomio, or Survey Monkey, for example) will do just fine.
- **Special accounting expertise**— Participants already have the knowledge and expertise they need in the PB process—they don’t need special accounting or budgeting knowledge participate. (The process also doesn’t need to be run by budget/accounting staff—although they can play an important role in giving feedback on project proposals.



# Generating Interest In PB

**A successful PB process needs buy-in from across your organization. This section has ideas for how to advocate for PB and get people excited about it. Here's where to start:**

- **Get the conversation started by explaining to folks what PB is.** Introduce the idea at an organization-wide meeting or send out an email.
  - › Use the information from “What is PB?” to draft an email or talking points—or you can make a copy of the content and share it directly with people.
  - › Check out [participatorybudgeting.org](https://participatorybudgeting.org) for more information on PB.
  - › Read this [blog post](#) to see how PBP talks about their process.
- **Help people envision what a future with PB looks like.** Create a big picture goal and vision for your PB process. (It could be as simple as: we're doing this to create more important work, together, in a participatory and equitable way!)
  - › Use these [sample projects](#) to give people an idea of what can be accomplished with PB—or come up with examples of your own.
- **Create space to discuss the values and goals that should drive the PB process.** Making sure that your organization is aligned around the values and goals of the PB process is critical. Doing this will help create a shared vision of why PB matters within your organization and it will help define what a successful process and projects look like.
- **Open up space to discuss how power operates within your own organization, including how budget decisions are made right now.** Here are some prompts that can help with discussion and visioning:
  - How can we effectively question assumptions that we may hold as an organization (or our existing leadership may hold) about how we allocate money and other resources across the organization?
  - How do we support and prioritize the professional development and leadership of Black, Indigenous, and people of color staff and partners? How about trans, non-binary, non-conforming staff and partners? And staff and partners who live at various intersecting identities?

- What investments are necessary for us to dismantle white supremacy culture, including the non-profit industrial complex that exists within our organization and sector?
- How can we use internal funds to redistribute wealth and knowledge beyond our organization, to our partners and the community at large?
- **Spend time addressing people’s concerns.** Introducing a new way of doing things can be challenging—and some folks will be more comfortable with change than others. Make sure you create time to answer people’s questions and concerns. You can use the common questions in the following section to help you prepare.



# Working Through Common Questions

Below are some questions people in your organization might have about PB, paired with talking points and discussion prompts you can use to more deeply discuss its benefits.

**Question #1:** Who has the power in the process? Who gets to make decisions?

## Talking points

- PB is an opportunity to share decision-making power within your organization, and/or with people in your organization's network. Instead of making decisions from the top down, you'll decide together where the money goes.
- Steering Committee members will play a leadership role in the process—they'll set goals for the process, design the rules for how it works, and provide oversight to make sure the goals are met.
- Budget Delegates will have the power to review and shape project ideas. (Staff will also have the opportunity to review and weigh in on project ideas, whether or not they choose to be a Budget Delegate.)
- Voters will have the power to decide which projects get funded and implemented by voting on eligible projects.
- If we do it right, PB is an opportunity for us to challenge white supremacy culture by giving power to people who have been excluded from decision-making within our organization and our communities. (But PB isn't a substitute for other workplace rights and reforms, like equitable hiring and pay practices!)

## Discussion prompts

- *How can we use PB to support and prioritize the professional development and leadership of Black, Indigenous, and people of color staff and partners? How about trans, non-binary, non-conforming staff and partners? And staff and partners who live at various intersecting identities?*
- *Who else is marginalized in our organization's decision making—and our community at large? How can we include them in the PB process?*
- *What role would you like to have in PB?*

## Question #2 : Where is the money coming from to do this? Does it require new funding?

### Talking points

- Talk about what part of your budget you'll use for PB. If you haven't decided that yet, present the options and talk about the pros and cons of each.
- PB doesn't require a new budget—and it's not even about creating new line items. It's about sharing power and changing the way we make decisions about money in our organization.

### Discussion prompts

- *How do you think our organization could benefit by making decisions together about how our money gets spent?*
- *What questions or concerns do you have about doing PB?*

## Question #3 : What will the tangible results of the PB process look like? When will projects get implemented?

### Talking points

- Share examples of what good project ideas could look like.
- › **You can see examples of projects that were funded in PBP's internal PB process [here](#).**
- In addition to funding important projects, PB is also about changing the culture of organization to support shared decision-making.

### Discussion prompts

- *How do you think PB could shift how our organization spends money?*
- *What kind of projects would you like to see get funded in the PB process?*

## Question #4 : How will this impact my/my team's workload?

### Talking points

- Talk openly about what projects could mean for individual and/or team workloads, as well as what resources are available to support the work.
- Make sure stakeholders across your organization—including people in power— understand what they're consenting to by participating in shared decision-making.

### Discussion prompts

- *What opportunities do you see for your work?*
- *What concerns do you have about how your workload could be affected?*
- *Do you have any questions or concerns about what consenting to the PB process means?*

## Question #5 : Why should we prioritize PB when we have X, Y, and Z competing for our attention already?

### Talking points

- PB is a method for making decisions about and prioritizing our work in a transparent and participatory way. It's a way of shifting the way we work together and building a culture of participation within our organization.
- We'll all have the opportunity to participate in and shape how some of our organization's money gets spent.

### Discussion prompts

- *What concerns do you have about making spending decisions with a participatory process?*
- *What support would help you feel more flexible and open to the outcomes of the process?*



## Question #6 : How will we manage competing priorities and self-interest?

### Talking points

- The Steering Committee will be responsible for setting clear goals and criteria that projects must meet in order to be eligible. The Steering Committee will be representative of the organization as a whole (not just management) and members will make decisions collectively about the process.
- Budget Delegates and staff will have the opportunity to vet projects for feasibility.

### Discussion prompts

- *Are there other ways we can make sure certain voices don't dominate others in the process?*
- *What can we do to build a sense of community and shared purpose before the PB process kicks off?*

## Question #7 : How will we know if we're successful?

### Talking points

- The Steering Committee will lay out criteria to make sure project ideas are aligned with our organizational values. An evaluation will happen at the end of the process to see how successful we were in meeting our goals.
- We'll also create implementation and monitoring plans to make sure projects get done.

### Discussion prompts

- *What would a successful process or project look like to you?*



# 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](mailto:info@participatorybudgeting.org) to share your story or questions.

## Acknowledgements

This guide is an initiative of Democracy Beyond Elections and the Participatory Budgeting Project.

**Project lead:** Ingrid Haftel

**Project support:** Elizabeth Crews; Antonnet Johnson, PhD; Rahel Teka

Special thanks to Kristina Banks (PBP), Michael Cusack (PBP), Shari Davis (PBP), Kristania De Leon (PBP), Kayla Knight (PBP), Deborah Chang (Youth Power Coalition), Samantha Daley (BYP100), Sabrina Miller (Cooperation Humboldt), Holly Sansom (Theatre of the Oppressed NYC), and Chris Tittle (Sustainable Economies Law Center) for their invaluable feedback.

