

Participatory Budgeting Key Metrics: Questionnaire for Evaluators and Implementers

The goal of this questionnaire is to provide a standard way for local evaluators and the PB Research Board to collectively document and compare key aspects of PB processes across the U.S. and Canada and over time.

This is also intended to assist local evaluators and implementers keep track of key information about specific participatory budgeting (PB) processes while the process is ongoing and from year to year.

Completing this form

Each item in this 30-question form informs a PB Key metric, and having these answers will allow you as well as other PB researchers to report impacts on your PB process. We highly advise you to look over this form before you start your PB process, so you're aware of what you'll want to track.

To maximize the form's usefulness to PB administrators as a data collection tool, you may use this paper questionnaire or request an online version. Contact the Participatory Budgeting Project to use the online form.

Please complete this form to the best of your knowledge and ability.

If you are unsure about a question, feel free to leave it blank.

The PB Key Metrics

The Participatory Budgeting Project, in collaboration with local evaluators and implementers, aims to collect data from each PB site across the U.S. and Canada to analyze the growth, reach and impacts of PB in individual communities and across North America.

We hope local evaluators or implementers will be able to complete this form for **each** PB process they are researching or implementing (that is, in a city where several districts are implementing distinct district-wide processes, we hope evaluators or implementers will complete a separate form for each district).

Get further details, free instruments, and support on tracking the PB Key Metrics here:

<https://www.participatorybudgeting.org/for-researchers/>

Need Help?

Please contact Jake at Participatory Budgeting Project at jake@participatorybudgeting.org with questions or feedback on this form.

Name of PB District, City, County, School or Community

If you are evaluating or implementing more than one PB process, please complete a separate form for each process:

Information about your city, county, or school

Please identify the type of place

- ☐ City
- ☐ County
- ☐ District or Ward
- ☐ School
- ☐ Organization

What is the total population? _____

CORE METRICS

Information about the process

1. What month and year did idea collection begin? _____
2. What month and year did voting conclude? _____
3. How many people participated in this process? (*Use number of voters, unless you have detailed data to be able to identify unique participants throughout the process*): _____
 - a. If you do have unique participant data, how many people voted in your process? _____
4. How many of the following other participants or volunteers did you have through this PB process?
 - a. Idea collection participants _____
 - b. Steering committee members _____
 - c. Budget delegates _____
 - d. Volunteers to help with outreach, voting, or other aspects of the process _____
 - e. If you do not have these numbers, how many total volunteers did you have throughout the process? _____
5. How many idea collection events or assemblies took place? _____
6. How many different in-person voting sites were there? _____

7. How much money was originally pledged for projects for this PB process (not including the implementation budget)? _____
8. Please identify the source budget from which the money comes (eg., council member discretionary funds, tax increment financing, youth programming, etc.)
- ☐ City capital budget
 - ☐ City general funds
 - ☐ District or ward discretionary capital funds
 - ☐ District or ward discretionary general funds
 - ☐ City agency capital funds
 - ☐ School district funds
 - ☐ Other (TIF, Measure B sales tax, etc) _____
9. What is the total size of that source budget for this year? (eg. if the source money is a council member's discretionary fund, please report the total of this one council member's discretionary fund, not the total amount of all council members discretionary funds) _____
10. Are there any factors on the source of the money that are important to note? (eg. only can be used for capital funds, can be spent only on parks, etc):

11. Did any additional money come for projects on the ballot or related projects, beyond what was originally pledged? _____
- a. How much? _____
 - b. Please describe how PB inspired that additional money to come in.

Participation

12. How many ideas were submitted?
- a. In-person _____
 - b. Online _____
13. How many votes were cast
- a. In-person _____
 - b. Online _____
14. What percentage (%) of voter survey respondents were people of color? (*Report the percentage of survey respondents who indicated something other than "white" as their racial/ethnic identity. Include those who indicate "white" along with other racial/ethnic identities*)

15. If you collected information on the racial/ethnic identity of other volunteers in the PB process. What percentage (%) were people of color, and which group was surveyed? (For example, "25%, idea collection participants") _____
16. In total, how many organizations were represented in steering and district committees, and that helped with outreach? (Include only organizations that district/city/county offices partnered with (through contracts or on an explicit volunteer basis) for the purpose of outreach - including organizations that hosted an idea collection meeting or were a voting site.) _____

ADVANCED METRICS

Vote

What was the date (day or days, month, and year) of the vote? _____

Survey Results

17. How many voter surveys were completed? _____
18. What percentage (%) of PB voters, who were eligible to vote electorally, who reported that they did not vote in the most recent election? _____
19. What percentage (%) of PB voters are ineligible to vote in local elections? _____
20. What percentage of PB voters report prior civic engagement or participation? _____
21. What percentage of PB voters report being new or returning to PB?
- a. New _____
 - b. Returning _____
22. What percentage (%) of voter survey respondents reported making less than \$25,000 in annual household income? _____
23. What percentage (%) of volunteers reported making less than \$25,000 in annual household income, and which group was surveyed? (eg. 25% of idea collection participants) _____
24. How many different non-governmental or community-based organizations were involved? (*"involved" means they participated in a steering committee, helping with outreach - any role in the process*): _____

25. What percentage (%) of PB funds were allocated to the following project types.

- a. Culture & arts _____
- b. Libraries _____
- c. Community & social services _____
- d. Schools _____
- e. Parks & recreation _____
- f. Streets & sidewalks _____
- g. Transportation & traffic _____

26. What were the voting eligibility criteria for your PB process?

27. How much did you receive in grant funding (or other sources) explicitly allocated for implementation costs? _____

28. What, if any, is the amount of money your city, county, district/ward, school, or organization paid to do Participatory Budgeting? _____

29. What is your best estimate of the cost of city staff time to implement this PB process? *(note, this can be difficult to calculate. The simplest way is estimated staff hours by an estimated hourly rate. Planning to track time at the beginning of the process can help with this)*

CITATION & SIGNOFF

Person filling out this report _____

Organization name _____

Who should be cited or thanked for reporting and tracking this information?

I understand that this data is aggregated and anonymized, and used to report on PB across North America, and give permission for the Participatory Budgeting Project and/or the PB Research Board to use this information in an aggregated and anonymized format: _____

Date: ____ / ____ / _____