

# **PB Victoria Steering Committee 2017: Rulebook**

Updated: December 11, 2017

# About this Rulebook

This handbook is a living document meant to be revised annually. It was first put together in Summer 2017 by the Participatory Budgeting Victoria Steering Committee, a group of volunteers mandated by the City of Victoria to develop local guidelines for Participatory Budgeting. Here you will find the definition, goals, and rules of Participatory Budgeting in Victoria.

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# Background

## What is Participatory Budgeting?

Participatory Budgeting (PB) is a democratic process in which community members directly decide how to spend part of a public budget. The process was first developed in Brazil in 1989 and is now practiced in over 1,500 cities around the world. PB, as a form of participatory democracy, involves public meetings, outreach, discussion, and voting so that the public can be engaged in decision-making

## What is PB in Victoria?

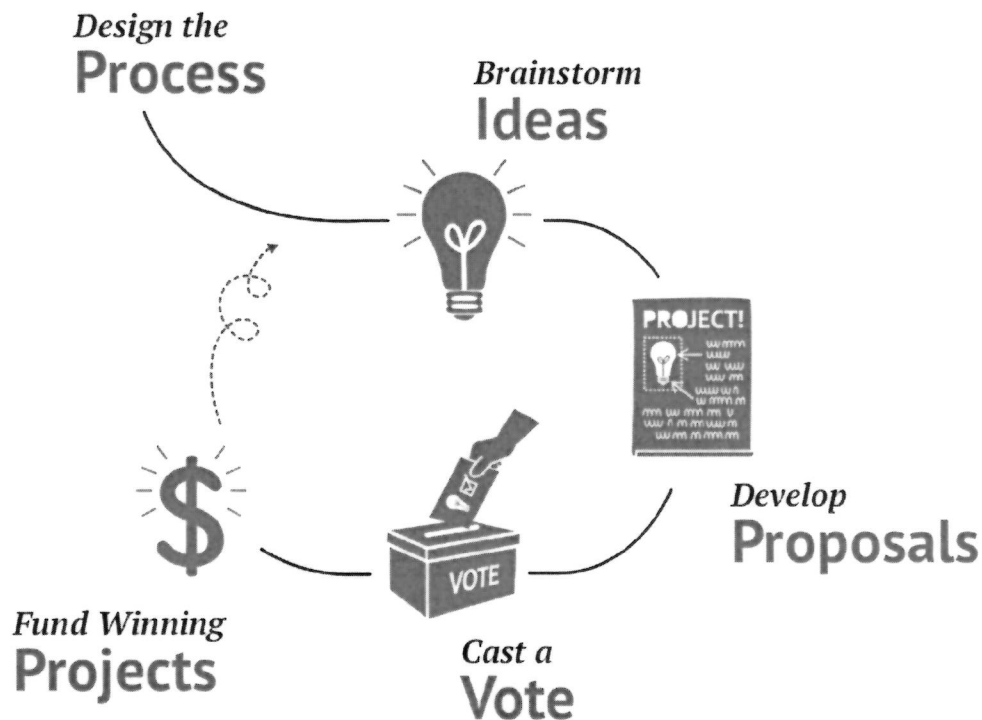
Participatory Budgeting is an innovative democratic process that gives an entire community the opportunity to participate and decide how to invest a portion of the City of Victoria's annual budget. This approach is being piloted in Victoria based upon successful experiences and investments made in other cities across the globe.

In 2014, Victoria's City Council directed staff to develop a Participatory Budgeting pilot as part of a two-year phased transformation of the financial planning process. The 2015-2018 Strategic Plan, under "Engage and Empower the Community", outlines actions to design a Participatory Budgeting process which will build the capacity of neighbourhood/community associations and empower neighbourhood residents, place makers and others to lead and implement public projects. This Participatory Budgeting pilot builds on increased public participation in the City's budget process over the past two years.

Sixty thousand dollars of the within the 2016 Financial Plan has been allocated towards Participatory Budgeting. The Participatory Budgeting process is intended to engage citizens in decision-making, and to empower consensus-building and deliver community benefit through investment. \$10,000 have been dedicated to promotion, community outreach, and capacity building, with the remaining \$50,000 available for the community to decide how to best invest in Victoria.

Victoria's process is being supported by the Participatory Budgeting Project, a non-profit agency based out of New York City that grew out of a 2005 social forum in Porte Alegre, Brazil, which has since helped participatory processes across Canada and the US.

The Steering Committee invites proposals from residents of the Capital Regional District (CRD) for infrastructure, programs, services or events that improve the City of Victoria. Project proposals will be voted on by the public to determine the allocation of funds.



## About the PB Steering Committee

PB is a process designed by and for community members. A Victoria PB Citizen Steering Committee was formed in May 2017 following a call by the City of Victoria for volunteers. The Steering Committee aims to be representative of City of Victoria residents and has designed the PB Victoria process, including project eligibility criteria, voting, and community outreach. City of Victoria staff support the PB Victoria process, but do not play a role in the deliberation or decision, nor do elected officials.

## Goals and Principles

### Goals

The PB Victoria Steering Committee is committed to the following goals:

- Increase civic engagement**  
 Engage more people in politics and the community. Specific communities targeted include young people, visible minorities, immigrants, low-income people, the formerly incarcerated, and other marginalized groups.

- **Showcase City decision-making processes**  
Allow residents a greater role in and understanding of municipal spending decisions, and inspire increased transparency in Victoria's government.
- **Build community relationships and support diverse communities**  
Inspire people to more deeply engage in their communities, and to create new networks, organizations and community economic opportunities.
- **Encourage inclusive participation**  
Run a fair and just PB process, encouraging the participation of all community members. A focus on equitable participation, by working hard to engage the most marginalized populations, will lead to a more diverse and representative process.

## Principles

The PB Victoria Steering Committee is committed to the following principles:

- **Openness and transparency**  
Share information and make decisions as openly as possible.
- **Simplicity and efficiency**  
Keep the PB process straightforward and efficient so it is easy for community members to participate.
- **Inclusivity**  
Include the entire community - especially those who are often excluded from the political process, who face obstacles to participating, or who may feel disillusioned with politics.
- **Participatory democracy**  
Bring people together across traditional lines of division, to work together for the good of the whole community.

## Program Details

Greater Victoria residents and local community groups are encouraged to sponsor and put forward creative proposals for the PB Victoria process. The PB process aims to support projects and/or events that benefit and can be enjoyed by the community.

Project proposals can be submitted by residents of all 13 municipalities within the CRD for projects to be implemented in the City of Victoria. After administering the PB public engagement and voting process, the inaugural PB Steering Committee will award \$50,000 to implement the successful local community initiatives, as voted by the public.

Criteria for projects or investments identified within the PB Victoria process have been set by the PB Steering Committee:

- Projects must be within the City of Victoria
- Construction or commencement of the participatory project(s) must occur within 12 months of the funding decision
- Projects can be put forward by individuals, groups, or non-profits organizations.
- Private businesses cannot put forward a project, but can sponsor one by providing additional funds
- Projects cannot cancel or delay projects already planned or underway by the City of Victoria or other community groups
- Projects must adhere to City bylaws, rules and regulations

### **Project Proposals**

Community members will submit an initial Project Proposal for review by the Steering Committee. The deadline for proposals is September 28<sup>th</sup>. If the proposed project meets the PB Victoria criteria, the community member can be asked to complete a detailed project proposal (budget, implementation details, and impact) to share with the community during the Community Voting process. The Steering Committee will be available to assist community members in developing both proposals. Project proposals may include budgets for up to \$50,000 in PB Victoria funding.

### **Public Showcase**

Proposals will be showcased to the public through online platforms as well as community information sessions (or 'project expos'). Community members will be encouraged feel empowered in their role in the PB process while learning of the different projects their neighbours have put forward

### **Community Vote**

Community members will be provided an opportunity to vote on their preferred project(s).

## **Roles and Responsibilities**

- **Steering Committee - volunteer representatives overseeing process**
  - Design and guide PB process and draft the PB Victoria Rulebook
  - Attend PB events and meetings to publicize and introduce community groups to the PB process
  - Provide support for the PB process, including research, organization, media, online engagement, social media, policy & budgeting, data visualization, and design
  - Promote the PB process through the press, social media, and other networks, using protocol agreed upon by the Steering Committee
  - Mobilize broad, inclusive, and proportional community participation
  - Evaluate and revise the rules of the PB process
- **Support Committees**

- Support the Steering Committee in select phases of the PB process such as community outreach, events, and evaluation
- **Project Proponents - community members with ideas to submit**
  - Prepare a proposal overview
  - Prepare a detailed project proposal and budget
  - Commit to staying involved if necessary during the implementation of the project and participate in reporting requirements
  - Maintain ongoing communication with Steering Committee members
- **Voting Public - community members voting on proposals**
  - Become informed about potential projects through the website, social media, and project expo
  - Vote on preferred projects through a voting process set out by the Steering Committee
- **City Staff**
  - Provide support to the Steering Committee and ensure alignment with City policies and practices in relation to use of technology, freedom of information, communications, protocol, etc.
  - Review project proposals for feasibility and compliance with City bylaws, rules, and regulations.
  - Distribute funds to the Steering Committee to support the PB process
  - Monitor Steering Committee meeting minutes and communications to ensure the Committee contributes and answers questions as needed
  - Accept final report from Steering Committee
  - Provide updates to Mayor and Council at key milestones throughout the project
  - Distribute funds to successful projects for implementation
  - Provide communications support including templates, City of Victoria website updates, and assistance with other City communication tools i.e. neighbourhood hot sheets, media releases, online events calendar
- City Council**
  - Receive updates from City Staff on the progress of the Participatory Budgeting process

## PB Victoria Timeline 2017

Date	Activities
May 18 - July 28	<b>Steering Committee Design Process</b> <ul style="list-style-type: none"> <li>• Develop Rulebook and project proposal guidelines</li> <li>• Outreach plan and materials developed</li> </ul>
August 11th	<b>Call for Project Proposals</b> <ul style="list-style-type: none"> <li>• Share resources and proposal form with community organizations</li> <li>• Advertise project through City of Victoria website and social media</li> </ul>
August 11 – October 7	<b>Community Outreach and Engagement</b> <ul style="list-style-type: none"> <li>• Outreach (posters, media release, letters, social media, etc. calling for project proposals)</li> <li>• Community info sessions and presentations</li> <li>• Steering Committee works with individuals and organizations to research and develop proposals (with subject matter experts, where necessary)</li> </ul>
October 7	<b>Deadline for Project Proposals</b> <ul style="list-style-type: none"> <li>• Saturday, October 7th at midnight</li> <li>• Submitted online via <a href="mailto:pbvictoria@victoria.ca">pbvictoria@victoria.ca</a></li> </ul>
October 7 - November 20	<b>Proposal Overview Review</b> <ul style="list-style-type: none"> <li>• Steering Committee reviews short project proposals against criteria and eligibility</li> <li>• City staff to review all proposals to ensure feasibility</li> <li>• Steering Committee identifies project proposals to put forward to Community Voting, notify applicants</li> <li>• Work with Project Proponents to finalize budget and project information</li> <li>• Identify subject matter experts, if necessary, to help project proponents with proposal and implementation of project</li> </ul>



	<ul style="list-style-type: none"> <li>Assist project proponents to develop Community Voting project information</li> </ul>
<b>November 20-December 3</b>	<b>Detailed Project Proposal Development</b> <ul style="list-style-type: none"> <li>Steering Committee works with Project Proponents to develop detailed Community Voting project information</li> <li>Connect Project Proponents with subject matter experts, if necessary, to help with implementation of project</li> <li>Finalize Project Proposal information</li> </ul>
<b>December 3</b>	<b>Deadline for Detailed Project Proposals</b> <ul style="list-style-type: none"> <li>Final project proposals submitted to Steering Committee with information for Community Voting</li> </ul>
<b>Mid-December</b>	<b>Project Proposals Announced &amp; Voting Opens</b> <ul style="list-style-type: none"> <li>Detailed project proposals information reviewed and then posted online and announced to community</li> <li>Community outreach and engagement around proposals and voting process</li> <li>Online voting opens Dec 13th</li> <li>In person voting at City Hall- Douglas Street entrance</li> <li>Community outreach and engagement around proposals and voting</li> <li>Voting ends mid-to-late January</li> </ul>
<b>January</b>	<b>Winner Announced</b> <ul style="list-style-type: none"> <li>Review of final votes and successful proposals</li> <li>Notify successful proposal proponents of reward</li> <li>Proponents must complete implementation within 12 months</li> </ul>
<b>January-February</b>	<b>Evaluation and Reporting</b> <ul style="list-style-type: none"> <li>Review of PB Victoria process</li> <li>Updates to Rulebook</li> <li>Report to City Council</li> </ul>

# Community Voting

The Community Voting process aims to increase civic engagement and showcase City decision making through a process that is open, transparent, simple, efficient, and inclusive.

PB Victoria will include both online and in-person voting. SurveyMonkey will be used for the online vote and paper ballots can be cast via a voting station that will be located at City Hall from mid December to January 20<sup>th</sup>. Participatory Budgeting Steering Committee members will also be holding several pop-up poll stations throughout the community where voters will be able to cast paper ballots (watch our Facebook page for more details). Paper ballots will be entered into the online system by Participatory Budgeting Steering Committee members.

The Participatory Budgeting Steering Committee opted to include both online and paper voting in order to make the process as accessible as possible to all members of the community. Voting is open to all CRD residents.

## Evaluation Process

The PB Steering Committee will evaluate the PB Victoria process during all stages, in addition to a final evaluation process. This will be compiled into a Lessons Learned document. For the 2017 PB Victoria process, the Steering Committee will:

- Document outreach activities and manage contact information for community contacts and stakeholders
- Track and respond to questions and feedback about the PB Victoria process
- Ask for feedback from the public on the PB Victoria process at key points - Call for Project Proposals and Community Voting
- Track and record the number of inquiries about Project Proposals and the number of Project Proposals received
- Ask all Project Proponents participating in Community Voting for feedback on the process

The Steering Committee will refer to existing evaluation tools used in PB processes internationally<sup>1</sup>.

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<sup>1</sup> <https://www.publicagenda.org/pages/research-and-evaluation-of-participatory-budgeting-in-the-us-and-canada>  
<https://www.participatorybudgeting.org/>

## 2017 PB Victoria Steering Committee

- Alfred Black
- Jennifer Murdoch
- Julien Braun-McLeod
- Kelly Lynn Kurta
- Kelsey Singbeil
- Matthew Yee
- Mark Perry
- Meagan Greentree
- Don Monsour