

Appendix B: Lessons Learned and Recommendations from the 2016/2017 Participatory Steering Committee

Recommendations for the City prior to committee formation

- We recommend that the PBSC file be delegated to one staff member, predetermined expectations of the number of hours expected to work. The role, and level of involvement, of the City should be reflected in the expectations of the staff member.
- Establish terms of reference for the committee members; include a clear description of the City's role and expectation, as well as responsibilities of the committee, and level of expected commitment from each volunteer.
- The initial 'launch' of PB provided a push to get the ball rolling. Momentum coming from the launch event should be maximized, with the steering committee forming shortly afterwards
- We found that the group worked best when it was small (depending on the decided leadership structure).
- Although there were no issues that we were aware of, the committee was a bit uncomfortable with having the process advertised at \$60,000 and then having to turn around with the same poster at \$50,000

Recommendations for committee **formation**

- If there are training dollars, and if the committee will be expected to design and run the process
 - Note: Training could potentially be done online through webinars (if available) to save money. Training from city staff and/or former steering committee members would also be helpful
- It would be ideal to have a city staff, potentially with a member of the previous committee, facilitating the first few meetings
 - Clarify expectations and responsibilities of the committee and the participatory budgeting process
 - When people appear to be on different pages, it worked well to have people draw and present their idea of what the process should look like. Then field questions/clarification from other members;
 - Last year, this was a significant challenge, and was very time consuming;
 - Roles can be adjusted for various levels of commitment
 - Committee members should be asked to select a day of the week to schedule meetings, and to keep that day free regardless of the meeting frequency.
 - Facilitate the creation of roles, with defined responsibilities ****very important****
 - It would be nice to have at least one person on the committee paid to administer/manage the project. Whether this is a City staff member, an organization, or a committee member on a stipend. This would help with keeping on timelines and improved accountability to the City
 - Reviewing the Rulebook

- The Rulebook, although may be a bit outdated, provided an anchor or a charter to ground the group. It also was a source of literature to share committee members who came in mid-process
- The budget should be clearly defined. This past year, there was confusion at the end of the process, after the announcements had been made, of the true PB Budget within the City accounting. The committee realized afterwards that we had never been formally given a confirmed \$55K budget, we were told that approximately \$5K was spend.

Recommendations for committee **storming**

- Making an engagement strategy was a good exercise that could've been used better
 - Defining and strategizing outreach targets, including hard-to-reach communities
- Looking into ways that could encourage more applications from individuals or smaller groups rather than well established organizations. This could include the following:
 - Allowing time, or focusing committee capacity, to working with individuals with ideas to flesh out proposals to a point they are able to compete with larger proposals
 - Creating two separate application processes or pots of money.
 - Also, it was raised to leave a portion of the pot for small street improvements: bike racks, garbage cans, benches
 - The creation of a google drive folder was helpful for storing files and working collaboratively.

Recommendations for committee **performing**

- Call for proposals
 - Criteria coming from the City must be well defined prior to releasing the call
 - The initial expression of interest could have been simpler, to improve accessibility
 - Maybe an online video on how to complete a proposal
 - Submission of a basic idea, and then invited to an info session to flesh it out with City staff and the committee
 - Allowing more time for applicants to flesh out proposals, with support from the committee and/or public (through info sessions, online discussion, etc.)
 - A fill-able PDF or online form would work much better than a non-fillable PDF
- Outreach
 - Pop-voting would have worked better in the summer
 - It would be helpful if the relationship between the City, the committee, and the project were clearly defined prior to outreach. Branding of the project is an important consideration.
 - It would be helpful to have access to send emails from the pb account, even if that means leaving the @victoria.ca domain.
- Vetting
 - Clear communication between the committee and the City in expectations and timelines from both parties is key
 - It worked well for the committee to convene and go through the proposals as a group

- Voting
 - Better software to control duplicate voting, but survey monkey worked very well as a tool;
 - There is concern that by restricting IP address that have voted, we may have excluded the opportunity for schools, libraries, and lower income families/individuals to participate;
 - Having people pick 3 worked well to tone down the popularity contest reality.

ROLES:

The following is a list of some of the central roles and responsibilities the committee ended up performing. Most committee members wore different hats at different times rather than be designated with a specific role,

Communications role:

- Drafting and revising of engagement strategies for City reporting
- Developing content and providing feedback on posters
- Developing content and making revisions on media releases
- Developing content and making revisions on stakeholder emails
- Developing prompts (Q&A) for the committee for media requests/public inquiries
- Doing media interviews
- Social Media:
 - Creating and promoting adverts
 - Responding to messages and posts
 - Creating events for info sessions: inviting people, promoting
 - Note: It was great to have one person delegated as the social media person
- **Lessons Learned:**
 - Better coordination on who is responding to inquiries, both social media and email
 - Having a designated role for this worked well! The way we did it, the role eventually was split between a social media person and most of the rest was picked up by City liaison. The social media proved to be enough of a commitment for one volunteer. It is recommended that Communications and Social Media remain separate roles, but work closely together.
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Applicant Relations:

- Drafting, revising, and sending acceptance and rejection letters with personalized content with comments from the City for each applicant
- Drafting, revising, and sending updates to applicants as timelines change or become more clear
- Field questions from applicants, by phone and email
- Fielding questions from the public, applicants, and finalists
- Sorting incoming applications, consolidating completed applicants, and preparing necessary documents for the City for vetting

- **Lessons learned:** After a steering committee member made a book of PDF, the City requested a different format of presenting proposals and committee comments **after** the committee had met to review the proposals, then changed the requested format a second time. This created many hours of tedious work, that was previously delegated to someone else. It all could have been done more efficiently had the committee been aware of the expected format prior to the committee meeting to discuss proposals).

City Liaison:

- Coordinating between the committee and the City (ex. Requests from the City to the committee related would usually be sent through the City Liaison rather the City going directly asking the committee)
- Coordinating between external groups and the City, and between external groups and the committee (ex: coordination and recruitment of volunteers for SFU event, pop-ups hosts, info tables, media)
- Coordinating between the applicants and the City (ex. Questions regarding eligibility, supporting the phone-meetings with City Staff)

Outreach:

- Planning info sessions
 - Coordinating with the City to secure space
 - Coordinating with the City to arrange City representation
 - Developing PowerPoint
 - Arranging supplies for table activities
 - Arrange catering
- Pathfinding for pop-ups
- Street team – going to City Engagement events, pop-up voting
- Delegating out outreach list for targeted outreach
- Coordinating the announcement: venue, equipment

Logistics:

- Developing and revising application form
- Developing and revising second application form
- Developing and revising voting form
- Arranging/hosting committee meetings
- Taking minutes
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Budget:

- Track expenses, track balances in different accounts
- Managing petty cash

Other Lessons Learned:

- Attrition: There was substantial attrition on the steering committee. This made establishing roles very difficult the core group, however, being a smaller group proved to be more efficient in several ways.
- Cited reasons for attrition included:
 - Mismatched expectations on the process and/or commitment
 - Moving
 - Limited ability to maintain an online presence
 - This is an issue the committee really wishes we could've done better. We had a committee member who felt excluded because of not having a laptop to work from. After time and the process started unvailing itself, the committee's activities became increasingly online. We recommend that steps be taken in the future to accommodate for people wanting to participate.
- Overburden: If it happens again that most of the work falls on a few committee folders, it would be helpful to strategize on how to maximize efficiency to reduce the load. An example could be cutting the middle man between the City and the committee, or including in the rulebook that committee members should seek to support when they notice when other members are struggling with their load. For some committee members, PBSC demanded more than 20 hours per week. This is not a sustainable model to rely on.
- The committee felt the location of the in-person voting booth at City Hall was hidden from public traffic and would have attracted more voters if it were in the front foyer..