

Office of Participatory Budgeting

External Oversight Board - Planning Meeting #16

- 6:00 pm: **Welcome & Agenda Overview**
 - *Motion to adopt meeting minutes*
- 6:10 pm: **OPB Budget Overview**
- 6:20 pm: **Branding and Messaging Brainstorm**
- 6:45 pm: **Equity Guidelines (DRAFT)**
- 7:45 pm: **Public Comment**
- 8:00 pm: **Closing**

For questions or comments, please email pb@boston.gov

- Sent to External Oversight Board members to review in advance of this meeting

Note: Minutes will be posted in OPB's website, www.boston.gov/participatory-budgeting

Planning for Implementation Timeline *(Biweekly, 2 hours)*



Date	Planning for PB Implementation
May 9, 2024	Branding and Messaging Brainstorm Equity Guidelines
May 23, 2024	Equity Guidelines (cont.) Contract Partners
June 6, 2024	Demographic Survey Online PB Portal Resident Feedback
June 20, 2024	Prepare for PB Launch Roles for Idea Collection

OPB Budget Overview





Budget Overview



TIMELINE

- **November 2021:** Ballot question to create an Office of Participatory Budgeting approved by Boston voters.
- **July 2022:** FY23 City budget includes \$2 Million for participatory budgeting. No Office had been established yet.
- **Winter/Spring 2023:** The PB ordinance was adopted by Mayor Wu and City Council.
- **July 2023:** City allocated \$2 Million in FY24 budget for Office of Participatory Budgeting, AND transferred the unspent FY23 money (\$2 Million) to the Office's Special Revenue Fund for PB projects.
 - Special Revenue Fund allows the Office to make payments to support multi-year projects.
- **Spring 2024:** FY25 recommended budget supports the Office of Participatory Budgeting with a level allocation of \$2,126,966, adjusted for new staff expenses. Final FY25 budget to be adopted in June.

	FY23	FY24	FY25
Budget Allocation	\$2,000,000	\$2,000,000	\$2,126,966 (proposed)
Special Revenue Fund	- 	\$2,000,000 	\$2,000,000 + (TBD)

Branding and Messaging Brainstorm



PB Equity Guidelines

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Context

- *Research demonstrates that PB cities have operationalized equity very differently based on local context*
- *Boston is unique in adopting and operationalizing equity guidelines in PB*

Approach

- *Setting equity statement, goals, and guidelines for the process that benefits all residents, with an emphasis on priority populations*
- *Priority Populations: Include residents who (1) cannot or do not participate in civic life; (2) residents who have been historically excluded or underrepresented; and (3) residents living in historically underserved neighborhoods.*

PB Mission and Guiding Principles (PB Rulebook)



Mission Statement:

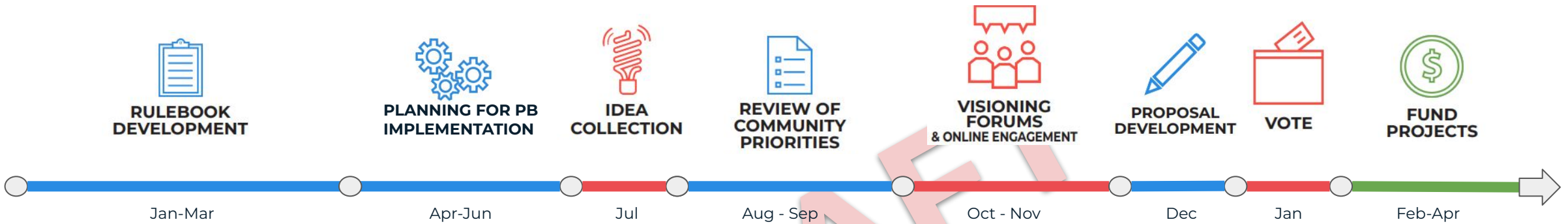
The Office of Participatory Budgeting provides an official point of entry for Boston residents to contribute to the city's budget process.

- Furthering public engagement and direct democratic involvement
- Building collective capacity on issues of racial and social justice
- Aligning with the City's goals of achieving and embedding equity and inclusion into City practices

Guiding Principles *(Co-Developed with the Board)*

- **Civic Education & Empowerment** - educate community about local government decision making and empower them to be more involved in civic processes, testing new ways to maximize community involvement.
- **Development & Impact** - the Office's funds are spent in ways that prioritize equity issues and address the greatest needs of the community.
- **Partnerships & Trust** - build partnerships between local government, community organizations, and residents to strengthen confidence and trust in local government.
- **Accessibility** - make it easy for people to participate in the City's budgeting processes.
- **Equity & Inclusion** - ensure the Participatory Budgeting process includes and benefits groups that have been historically disenfranchised.

Participatory Budgeting Timeline



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- Research on equity guidelines from City Departments and peer cities
- Create a draft with Finance Cabinet and City departments (Equity & Inclusion, Legal)
- Refine with the External Oversight Board and Public

City Departmental Scan

- Coastal Resilience (Environment Cabinet)
- Boston Public Health Commission (BPHC)
- Boston Planning and Development Agency (BPDA)
- Boston Public Schools (BPS)
- Streets Cabinet
- Equity and Inclusion Cabinet (E&I)

PB Peer City Review

- Seattle, WA
- Marin County, CA
- Louisville, KY
- New York City, NY
- Other Cities:
 - San Francisco, CA
 - Philadelphia, PA
 - Durham, NC
 - Chicago, IL
 - St. Louis, IL
 - Nashville, TN
 - Denver, CO
 - Los Angeles, CA
 - Sacramento, CA

City Departmental Scan- Key Findings



Coastal Resilience (Environment Cabinet)

Equity language and metrics

- *Social vulnerability metrics developed by US Army Corps*
- *Metrics are for consideration, not scoring and part of a broader feasibility analysis*

Boston Public Health Commission

Framework and Equity Assessment Questions

- *Community Health Needs Assessment (CHNA) & Community Health Improvement Plan (CHIP)*
- *Health Equity in All Policy Initiative - 5 P's (people, place, power, process, purpose)*

Boston Planning and Development Agency

Operationalizing equity established by DEI policy

- *DEI in Development Policy and DEI Requirements for Public Land Dispositions*

Boston Public Schools

Racial Equity Planning Tool framework and criteria

- *Criteria to inform decision making (all initiatives go through this model)*

Streets Cabinet

Criteria to determine priority

- *Priority is determined by not only demographics but measurable data sets like safety and crash history, proximity to community facilities, income, access to a vehicle, etc.*

Peer City Review Overview

- **Tier A: Equity is embedded and operationalized and have adaptable elements**

- Seattle, WA*
- Louisville, KY*

- **Tier B: Equity is embedded and operationalized, however there are limited adaptable elements**

- New York City, NY*
- Marin County, CA*
- San Francisco, CA
- Los Angeles, CA
- Sacramento, CA

- **Tier C: Equity is considered but does not appear to be operationalized (beyond stated goal) and/or is not accessible for review**

- Durham, NC
- Chicago, IL
- St. Louis, IL
- Nashville, TN
- Denver, CO
- Philadelphia, PA

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*Used for case study review

Peer City Review - Key Findings



Key takeaways from cities that have operationalized equity in PB:

- **Louisville, KY**
 - **Project evaluation matrix** scores proposals based on impact, equity, and feasibility of each project on a scale of 1-3.
 - Budget Delegates utilize the at the beginning of the process to evaluate projects and at the end to determine which projects go on the ballot.
- **Seattle, WA**
 - Budget Delegates utilize **PB Equity Goals and Values** as they assess and rank project ideas
 - **The PB Racial Equity Toolkit Worksheet** is used to assess equity for idea proposals. Evaluation framework that requests information on supporting data analysis, identified needs, stakeholder impact, strategies to minimize harm, evaluation and accountability, etc.
- **Marin County, CA**
 - **Equity Impact Statement and Equity Goals** incorporate County equity goals
- **New York City, NY**
 - **Project Equity Criteria** using a 1-4 scale for the following topics: Advances Equity, Promotes large-scale impact, Promotes deeper impact, and Addresses a need

PB Equity Guidelines

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Components and Uses of Equity Framework

Phase	Components	Objective
Overall	Equity Statement Equity Goals Equity Guidelines (Equity, Priority, Impact)	<ul style="list-style-type: none">• Reinforces equity in PB through process• Provides an equity framework to operationalize

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Of Note: *These Equity Components will be adopted into the Participatory Budgeting Rulebook*

Participatory Budgeting is designed to align with the City of Boston's goal of embedding equity and inclusion into City practices. The process will build collective capacity through broadening civic engagement, strengthening community relationships and partnerships, and cultivating trust and transparency in decision making for all Bostonians, including those underrepresented or historically excluded in civic life. The Office of Participatory Budgeting is committed to a just and inclusive process, where every voice is heard and valued.

Equity Goals for the PB Process



1. **Enhance Civic Engagement and Strengthen Community Trust**

(PB Rulebook Guideline- Civic Education & Empowerment | Partnerships and Trust | Accessibility)

2. **Address Ongoing Inequities Originating from the Historical Legacies of Institutions of Power**

(PB Rulebook Guideline- Equity & Inclusion | Development & Impact)

3. **Foster a Collective City**

(PB Rulebook Guidelines- Partnerships & Trust)

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Enhance Civic Engagement and Strengthen Community Trust

(PB Rulebook Guideline-Civic Education & Empowerment | Partnerships and Trust | Accessibility)

The Office of Participatory Budgeting will enhance civic trust and engagement by ensuring residents and community leaders are educated, informed, and empowered through the PB process. The Office will build partnerships with community organizations and residents to strengthen confidence and trust in local government. This includes investing in historically excluded residents during participatory budgeting efforts, ensuring their voices shape funding decisions, and valuing their priorities and lived experiences.

Address Ongoing Inequities Originating from the Historical Legacies of Institutions of Power

(PB Rulebook Guideline- Equity & Inclusion | Development & Impact)

Acknowledge and address that the City of Boston has played a role in causing and perpetuating the inequities in our society in order to create safer and more inclusive communities within the City. The PB process seeks to reflect the diverse perspectives and interests of the community, with emphasis on investing and involving those who been historically excluded in decision making processes. The Office acknowledges that different communities require unique approaches to achieve fairness and equity through the PB process and its outcomes. PB will invest and prioritize targeted and intentional community investments that have the greatest impact.

**adapted from Equity and Inclusion Cabinet Mission Statement*

Foster a Collective City

(PB Rulebook Guidelines- Partnerships & Trust)

In Boston, our goal is to inspire residents to actively participate in shaping Boston's future, creating positive change, and building a strong sense of civic pride. Participatory Budgeting seeks to bridge communities, empower all residents, and cultivate collective action towards improving the quality of life for all who call Boston home—a place where dreams can flourish, safety is paramount, opportunities are plentiful, and community thrives.

Equity Guidelines *(To Operationalize Goals)*



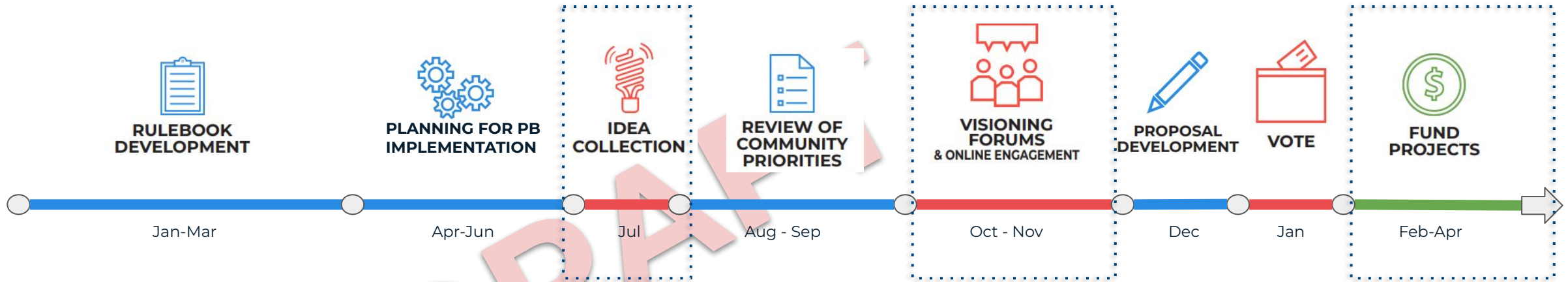
- **Equity:** *Historical legacies of institutions of power have shaped differences in access and power in the community. These disparities include the social, economic, structural and other barriers to the health and well-being of residents. **Projects will address ongoing and identified inequities in communities.***
- **Priority:** ***Projects will engage all Boston residents, including priority populations** such as residents who (1) cannot or do not participate in civic life; (2) residents who have been historically excluded or underrepresented; and (3) residents living in historically underserved neighborhoods.*
- **Impact:** ***Projects will meaningful improve the community's quality of life.** It will remove barriers to accessing an existing resource and/or provides a resource to a part of the community which did not previously have access.*

Operationalizing Equity Guidelines

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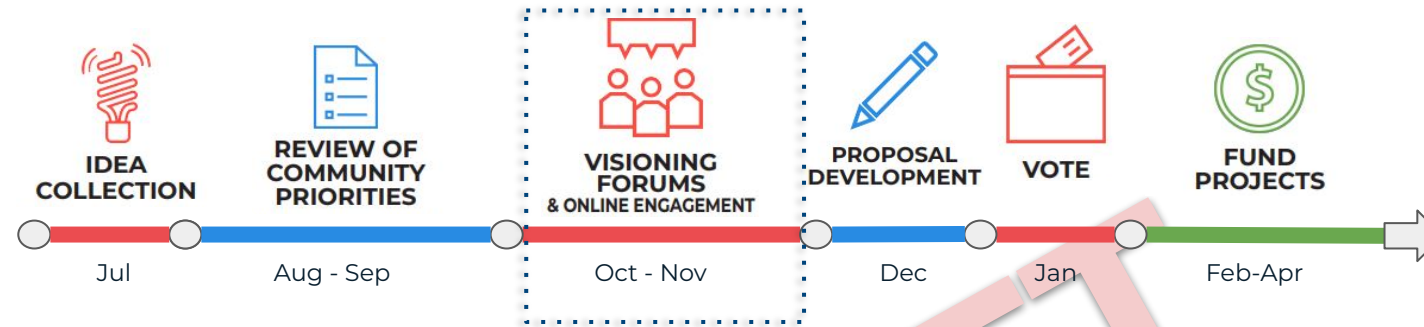
Operationalizing PB Guidelines



Phase	Components	Objective
Idea Collection	<p>Equity Question How does the project positively impact the community and/or advances social and racial equity?</p>	<ul style="list-style-type: none"> To consider as residents develop ideas in Idea Collection Workshops.
Visioning Forums	<p>Equity Guidelines (Equity, Priority, Impact)</p>	<ul style="list-style-type: none"> Considerations for residents to reflect on as they develop proposals from community priorities during Visioning Forums.
Fund Projects Phase (RFPs and Evaluation)	<p>Proposal Questions Related to Equity</p> <p>Proposal Evaluation Criteria/ Metrics</p>	<ul style="list-style-type: none"> RFP proposal questions community organizations will need to address in their response for projects Evaluation criteria/ metrics will be used by the City/ EOB to evaluate proposals

Visioning Forum: Example Equity Prompts

Facilitated Table Discussion



Examples Prompts for Discussion

Equity

- How does the project positively impact the community and/or advances social and racial equity?

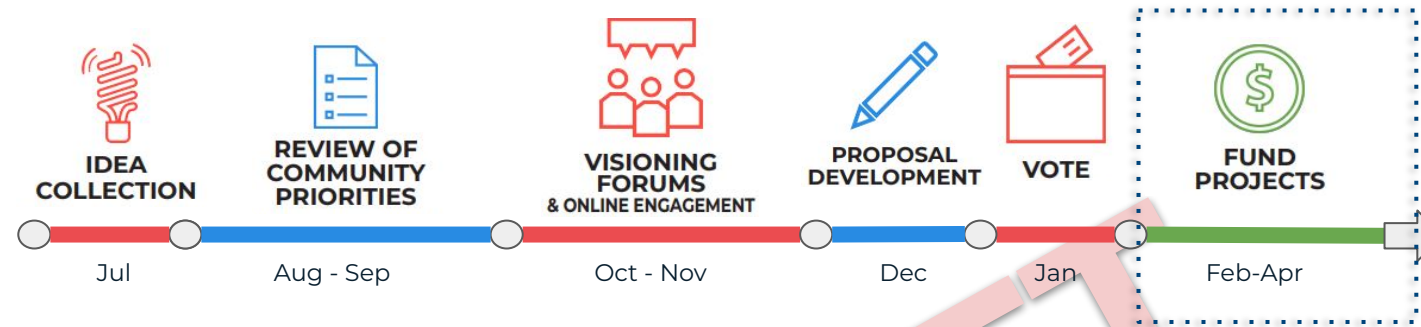
Priority

- Who are the community stakeholders and priority populations that are engaged in this idea?
- Is this project idea of significant priority in the community? If so, how and why?

Impact

- How will this project idea have meaningful impact on the community at large and particularly impact priority populations?

Example Equity Questions for RFPs



Examples Questions for RFPs

Proposal

- What is your proposed project? Please describe the proposal in detail and address the following:
 - What neighborhood(s) and communities will this project serve?
 - Who are the community stakeholders that will be engaged in the proposal?

Analysis of Data

- Demonstrate how this proposal addresses community priorities?
- What does data and your conversations with community stakeholders tell you about existing inequities and should be considered?

Equity

- How does this proposal advance the equity goals of the Participatory Budgeting initiative?
- How does this proposal mitigate disparities and increase equity?

Stakeholder Engagement

- Describe your strategy to outreach and serve City of Boston residents under this project, including outlining your strategy to ensure equitable engagement of priority populations.

Implementation and Assessment

- How will implementation ensure equity objectives are met?
- What will success look like for this proposal? (propose evaluation methods and associated metrics)

Proposal Evaluation Metrics (to score RFPs)

- *To be developed with Legal and Procurement department. Must be in compliance with City procurement guidelines.*

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Board Discussion



Public Comment

pb@boston.gov

