Participatory Budgeting in the UK: Tool Kit
Contents

Introduction to the toolkit ........................................ 3

Section A

1. What is participatory budgeting? .......................... 4
2. History of participatory budgeting ......................... 6
3. Political policy context for participatory budgeting 8
4. Risks and challenges of participatory budgeting ... 10
5. Different participatory budgeting processes ......... 12
6. The ingredients of participatory budgeting ......... 15
7. The role of the participatory budgeting unit ....... 17
8. Participatory budgeting case studies: ................. 19
   a) The Village Spend, Coedpoeth, North Wales 20
   b) Keighley Decision Day, Bradford ............... 22
   c) Claremont & Weaste Participatory Budgeting Event, Salford 24
   d) U-Decide Children & Young Peoples Event, Newcastle 26
   e) Harrow Open Budget, London .................. 28

Section B

9. Introduction to the ‘how to’ guide ......................... 30
10. Stages for implementing a small grants process ... 31
11. Stages for implementing a main stream budget . 32

Appendices – Resources for the ‘how to’ guide

Appendix A: Your chance to decide ......................... 34
Appendix B: Proposed time line ............................. 35
Appendix C: What matters most to you .................. 36
Appendix D: Sample invitation to bidders ............... 39
Appendix E: Sample information sheet FAQ .......... 40
Appendix F: Sample invitation letter ..................... 42
Appendix G: Hints on scoring sheets ...................... 44
Appendix H: Small grants matrix ......................... 45
Appendix I: Bingo sheet evaluation ...................... 47
Appendix J: Sample contract document ................. 48
Appendix K: Simplified Annual Cycle ................. 52
Appendix L: Annual PB and Planning Cycle .......... 53
Appendix M: Budget Quiz A & B .......................... 55
Appendix N: Priority Setting & Project Identification Exercise ........................................ 57
Appendix O: Example of developing a budget matrix .. 69
Appendix P: Example flowchart of annual cycle .... 72
1. Introduction to the Toolkit

This toolkit is available both in a “hard” paper format and as an interactive tool on the Participatory Budgeting Unit’s website at www.participatorybudgeting.org.uk. It will be regularly updated with new information and case studies. It is laid out to provide useful and practical information to local authorities, voluntary organisations and residents on how to carry out successful participatory budgeting programmes.

The purpose of the toolkit is to provide local authorities, other statutory agencies, voluntary groups and residents with a ‘how to’ guide on participatory budgeting (PB). The toolkit is a mixture of background information on PB and tools for implementing PB in a particular area such as case studies, step by step guides, and resources for use.

The toolkit is divided into two parts:

Section A: Background information

- What is PB?
- History of PB
- Political and policy context of PB
- Risks and Challenges of PB
- Different PB processes
- Ingredients of successful PB
- Role of the PB unit
- Five case studies

Section B: ‘How to’ guide for PB

The second part of the toolkit is the ‘how to’ guide. This guide comprises a breakdown of the stages of two distinct PB processes outlining the actions that need to be taken to move to the next stage. Links are made to useful resources that can be found at the rear of the guide. These resources include games, quizzes, proformas, templates letters and matrix tables.
2. What is Participatory Budgeting?

Participatory Budgeting (PB) is a mechanism that allows the citizens of an area (neighborhood, regeneration or local authority area) to participate in the allocation of part of the local Council’s available financial resources. PB aims to increase transparency, accountability, understanding and social inclusion in local government affairs. PB applies to a varying amount of the local Council’s budget and the actual process is developed to suit local circumstances.

In practice, PB provides citizens with information that enables them to be engaged in prioritising the needs of their neighbourhoods propose and debate new services and projects and set budgets in a democratic and transparent way. As the process becomes embedded it involves citizens being engaged in an annual budgetary cycle of setting priorities and budgets and monitoring the delivery of projects and services.

The PB process usually requires citizen engagement in the following phases of the budget cycle to identify the capital investments and projects to address the most pressing local needs:

- Preparing feasibility studies to support the appraisal of such investments or projects
- Preparing a budget proposal for submission to the local council
- Overseeing the budget approval process
- Monitoring budget execution
- Monitoring procurement (tendering, bidding and contracting);
- Evaluating the delivery of the service or public works

PB involves citizens, councillors and local government officers working together. PB aims to include those who are not traditionally engaged in policy decisions. As well as citizen involvement PB creates opportunities for greater efficiency in the allocation of public funds and increased community cohesion. The main features of PB include:

- A geographically defined area such as a local authority, a decentralised district of a local authority, or a defined neighbourhood
- Regularly scheduled meetings and debates in each geographical unit
- A cycle of activities closely following the local budgeting cycle
- A network of individuals and organisations involved in training, informing and mobilising local citizens

There is no universal way of applying PB. Methodologies vary from city to city but typically it involves allocating between two to three percent of the annual revenue budgets and sometimes the allocation of new investments. The process involves citizens taking into account both the demand and
supply of services and public infrastructure. In the UK, PB has mainly been applied to allocating resources for area regeneration and for directing statutory funds to voluntary sector organisations.

**Who benefits from Participatory Budgeting?**

Local government, citizens, voluntary organisations and the private sector all benefit but in different ways from the PB process.

**Benefits to Local Government**

- PB increases legitimacy by increasing dialogue, enabling better communication. When elected councillors seek citizen input in budget matters, their legitimacy increased.
- PB improves budget targeting through citizen participation in allocating public resources. The PB rules are set in such a way that they encourage the redistribution of spending in favour of less well-off neighbourhoods;
- PB builds consensus. PB can build consensus within and across neighbourhoods on the budget plan.
- PB can promote good governance: When local government share public expenditure information, citizens gain a greater understanding of the council’s work. Open government also reveals to citizens the limitations and constraints faced by councils. The process also provides opportunities for councils to be more accountable.
- PB supports the ‘duty to involve’. PB enables councils to comply with the provisions of the Local Government and Public Involvement in Health Act 2007 in providing a process of citizen engagement.
- PB encourages community cohesion. PB brings people together from different ethnic and faith communities to make decisions about their neighbourhoods. This provides an opportunity for everyone to meet and discuss the needs and aspirations of the community as a whole.
- PB help to develop the role of ward councillors as “community champions”. They can support specific events in the PB cycle which promotes political trust. PB will provide councillors with a greater understanding of the priority needs of their constituents.
- PB increases transparency and respect. Many citizens have limited knowledge of how local government works or how their council taxes are spent. Through the financial transparency of PB, citizens gain a greater understanding of how services are paid for and delivered. This can increase respect for the work of both council officers and elected members.

**Benefits to citizens include**

- PB provides citizens with access to local government information such as the amount of taxes collected, budgetary expenditure and budget forecasts.
- PB increases the voice of citizens in local decision making.
- PB provides an opportunity to deepen citizenship and democracy.
- PB allows citizens to engage in the development and renewal of their neighbourhoods.
- PB increases understanding of the different people in their neighbourhood.

**Benefits to Private Sector**

- Transparency: The business community often supports PB because it promotes transparency and provides them with greater information on how business tax is allocated and spent.
PB was first developed in Brazil in the 1980s as part of a larger effort to establish democracy and citizen participation after decades of military dictatorship, political patronage and corruption. It started in 1989 in the municipality of Porto Alegre and has now been developed in over 250 councils in 27 countries. Although the majority of these towns and cities are in Latin America a growing number of European municipalities in France, Germany, Italy, Spain, Portugal and the UK have adopted different models of PB to suit their circumstances.

Historically, three stages can be identified in the development and use of PB:

- First, from 1989 to 1997, was when PB was “invented”. This first occurred in Porto Alegre and other cities such as Santo Andre (Brazil) and Montevideo (Uruguay).
- Second, from 1997 to 2000 was the Brazilian “spread”, when more than 130 municipalities adopted the model, with regional variations.
- Third, from 2000 to present is the stage of expansion and diversification to other Latin American countries and to European cities and towns. European cities have initiated PB processes in Spain, Belgium, Italy, Germany, France, Portugal, Denmark, Switzerland, the Netherlands and the UK. A number of cities in Africa (for example in Cameroon) and Asia (for example in Sri Lanka) are starting their own PB processes.

PB has been carried out in cities and towns of all sizes and in semi-rural areas. The process has been applied to local authority areas and neighbourhoods and to target specific groups such as children and young people. It has been conducted using existing legal and constitutional frameworks. PB is adapted to suit the local political and social context.

Development of PB in the UK

Salford City Council was the first local authority in the UK to express an interest in using PB. In 2000 representatives from Porto Alegre met councillors and representatives from the community and voluntary sector and a feasibility study followed. In July 2003 Salford City Council set up a group to take the proposals forward. At this time other local authorities started to express interest in PB as it fitted with emerging policies on decentralisation and increased democratic processes.

The Local Government White Paper of 2006 and the Lyon’s Report of 2007 provided both an incentive and an opportunity for local authorities to adopt PB. The emerging policies included:

- a duty to “inform, consult and involve” citizens,
- accountability via information to citizens,
- local public ownership of assets,
- more citizen and user choices,
- citizen involvement in debates on local priorities, services and budgets, and
- public engagement to be a “bottom up” rather than a “top down” process.

The introduction of Local Strategic Partnerships (LSP),
Community Strategies and Local Area Agreements (LAA) encouraged partnership working across and between statutory, community and private sectors and citizens. Following the initial PB in Salford, the Participatory Budgeting Unit (a project of Church Action on Poverty) was set up in 2006 to promote PB around the UK. In July 2007 Hazel Blears, the Communities Secretary announced government funding for ten pilot PB project areas in England. Hazel Blears then announced a further 12 pilots in December 2007, also saying that she wants 100 PB pilots by the end of 2008 and that all local authorities should be engaging their citizens in PB by 2012.

The current pilots are:

- Bradford Vision, the Local Strategic Partnership, pilots include the Keighley project which engages local people in the allocation of small project funds. Bradford Vision has allocated over £1 million through PB.

- Birmingham, is using £2 million on environmental projects across several neighbourhoods.

- Lewisham’s pilot has been developed by the voluntary sector as a small grants programme. The criteria for funding were linked to the LAA.

- Manton (Nottinghamshire) has distributed £50,000, as part of the Neighbourhood Management Pathfinder programme. In 2008/09 they will be distributing £150,000 through PB, including £100,000 from the Primary Care Trust.

- Merseyside/the Mersey Waterfront regeneration partnership is using PB on a civic pride project.

- Newcastle has two PB pilots. Residents in the pilot area decide on the spending priorities on for a safer, greener and cleaner environment and secondly younger people are involved in decisions relating to local services for them. Both these pilots involve Neighbourhood Renewal Fund money and are part of the City Council’s Engagement Strategy. Newcastle is distributing £2.25 million through PB with Children & Young People in 2008/09 and are rolling out their ward approach to 5 wards

- St Helens, has devolved budgets to wards, all of which are using PB to distribute the money. They are continuing with this approach in 2008/09.

- Salford, PB pilot involved local people in 3 wards deciding the allocation of £100,000 from the Highways Budget. The PB pilot in Salford is continuing in 2008/09 for its third year and the amount of money to be distributed by PB has increased to £200,000.

- Southampton, the Primary Care Trust is using PB to allocate a small grants fund.

- Sunderland’s pilot, “The People’s Fund”, was a New Deal for Communities programme. It initially involved residents allocating a small grants fund of £30,000 for themes such as crime, transport and young people. Sunderland also used a PB process in their New Deal for Communities scheme.

A further 12 areas where announced in December 2007 where residents would get a chance to decide how their own “community kitty” would be spent. These new areas are:

- Thanet, the pilot consisted of £51,000 distributed by PB for local community grants.

- Wiltshire, in its transition to a unitary authority, Wiltshire County Council will be experimenting with Participatory Budgeting processes.

- Dartford, plans to allocate a small pot of around £30,000 of the council’s housing tenants’ budgets via PB, for housing environment issues.

- Sefton, developing plans.

- Cornwall, plans to develop PB along with local partners in the process of becoming a unitary authority.

- Lancaster, held a PB event where about 200 people from the community allocated £20,000 in small grants in the Morecambe Neighbourhood Management area of Poulton on the safer, stronger communities theme.

- Mansfield, plans to extend community engagement activities into PB project.

- Suffolk, developing plans.

- Leicestershire County Council, plans to develop community consultation into PB processes.

- Wirral, is considering doing PB with their Community Initiative fund through existing Area Forum structures.

- Reigate and Banstead, plan to use PB within their Local Community Action Plan.

- Buckinghamshire County Council, plans to use PB with a focus on transportation.
4. The Political Policy Context for Participatory Budgeting

Recent Developments:
Participatory budgeting fits well within the government’s agenda to modernise local government by encouraging strong and active communities to improve services at the local level. PB can be used as a way for local authorities and communities to plan services together and it can also be a practical demonstration of the government’s commitment to improving democracy, encouraging active citizenship and community cohesion. It can facilitate the mobilisation of citizens with the possible benefit of streamlining and providing a real focus to consultations.

The Local Government and Public Involvement in Health Act 2007 requires local authorities to inform, consult and involve the people in their areas – “to give people greater opportunities to have their say and get involved in the issues that affect their areas”. The White Paper, “Strong and Prosperous Communities”, that led to this act referred positively to PB and at the 2007 LGA conference Hazel Blears (Secretary of State for Communities and Local Government) announced a national programme of 10 local authority areas to pilot PB. The term “community kitties” is sometimes used as a catchier and voter-friendly term, rather than the more inhibiting term of Participatory Budgeting. It refers to pots of money that will be distributed using a PB approach.

Alongside reforms to local government there is also a move to encourage citizen involvement. “An Active Plan for Community Engagement”, published by the Department for Communities and Local Government in 2007, sets out how government will deliver on its commitment to bring about devolution and empower communities. The key areas of focus are: widening and deepening empowerment opportunities; supporting people to take up these opportunities; and strengthening local democracy. In its summary of activities the report recommends giving citizens a greater role in planning and in developing “community kitties”.

The following policy frameworks provide the opportunity for PB to be used to achieve.

Participatory Budgeting and the new local service agenda

Participatory Budgeting ties in with the new requirement on local authorities to involve citizens in carrying out of their functions. It can be used to assist Local Strategic Partnerships (LSPs), which now have to involve residents in discussions on the Sustainable Community Strategy (SCS) and the Local Area Agreement (LAA). It would also be appropriate to use PB in drawing up Neighbourhood Charters to prioritise services and outcomes in local communities.

The White Paper, “Strong and Prosperous Communities”, made it clear that LSPs would be expected to report back annually on progress on their LAA to local people. Neighbourhood and thematic meetings to discuss the progress on the LAA could also make decisions on citizen priorities for inclusion in the LAA in the following year.
Thus PB could be used as a tool to provide both a basis for a cyclical review of progress on the LAA and deciding on future priorities. It might also be used to provide a means of communication back to citizens of outcomes and new plans.

From April 2008 all local authorities will be required to have a Sustainable Community Strategy, which sets out the aims for the development of the local area over a 10 year period. The Sustainable Community Strategy has to be agreed with the community. This provides the opportunity to use a participatory budgeting approach to draw up Sustainable Community Strategies that gives citizens a longer-term time frame to set priorities and budgets and monitor progress.

One of the National Indicators used to monitor the LAA is National Indicator 4 – the percentage of people who feel they can influence decisions in their locality – this relates to the government’s Public Service Agreement 21 – to build more cohesive empowered and active communities. PB can help meet both NI 4 and PSA 21.

Participatory Budgeting and Comprehensive Engagement Strategies

A major theme of the local government white paper was the need for LSPs and Councils to develop Comprehensive Engagement Strategies (CES). By definition, this brings together the delivery of many public services by different agencies. Sometimes these are private contractors and increasingly third sector organisations. Part of the rationale behind the CES is to track cross-cutting issues, and some of these are particularly suitable for a PB-based approach. People respond more positively to being consulted on practical expenditure issues rather than on abstract themes and ideas. Those preparing a new CES could find PB a valuable tool.

Improving local democracy and the role of elected members

Representative democracy is the accepted form of government in the UK but participatory democracy where people’s views are not mediated through elected representatives is a new concept for many. The independent Councillors Commission report, “Representing the Future” published in December 2007 recognised the importance of the modern councillor being a vital part of participatory as well as representative democracy. PB can strengthen both forms of democracy.

Some councillors may claim that they have already adopted PB and that their annual budget making exercise is preceded by public consultation. They may also argue that they have a mandate at the ballot box, whereas those who take part in PB activities are self-selecting and not necessarily representative. But some experienced elected members are also aware that many citizens are ill-informed and disengaged about many aspects of public expenditure and budgets, apart from the general levels of council tax. PB gives councillors the opportunity to work with constituents to understand budgets and help them to direct how they are spent. Experience indicates that when councillors are integrated into PB it works well, and they begin to appreciate that it is a supportive not a competing process. Elected members could become community champions by accompanying their constituents through the PB process and seeing that it gets through all the council’s budget making procedures.

PB can help overcome public scepticism

Many individuals and community groups might feel that they have been “over-dosed” on consultation and participation without tangible results. Research and practice indicate that few citizens are willing to take part in public engagement exercises. But PB improves accountability and transparency and could overcome public scepticism and apathy.

PB a national strategy

The department of Communities and Local Government are currently (March 2007) drafting a National Strategy on Participatory Budgeting – “Giving more people a say in local spending”. This strategy will aim to promote awareness, develop and deepen PB pilots, produce guidance materials, work with government departments on applying PB, and finally provide evaluation and research to increase evidence of good practice.
5. The Risks and Challenges of Participatory Budgeting

Participatory Budgeting for many is a new idea and a new way of planning and budgeting and like all new things it comes with some risks and challenges. But to be forewarned is to be forearmed.

Risks:

1. Viewed as another bandwagon

Many people, especially those living in the more deprived communities, have been “consulted” endlessly about such things as housing, crime the environment and community facilities. There is a risk that people may view PB as just another bandwagon. Any new PB process needs to prove that it is not just another consultation exercise but that it works by delivering not just the views but the services and facilities that people want. Communities need to see that PB is worth the effort.

2. Lack of support from Councillors and Senior Officers

Elected members and officers with responsibility for budgets may be half hearted or even hostile at first but they need to see that in the end PB will help them and the people that they represent and serve by delivering the services and facilities that are really wanted or needed. Hostile or uncooperative councillors or officers could seriously jeopardise a PB programme but at the same time it is important to include them from the beginning of the process.

3. Hijacked by special interest groups

There is always a risk that special interest groups could hijack a PB process but checks and balances should be built in to the priority setting procedure and voting system to avoid this from happening. This is easier to manage at a neighbourhood level than at a city level. In a local authority wide PB process participants may not always be from the most disadvantaged areas and the agenda might be set by those wanting overall cuts in services. It then falls to the elected members of the council to make a political decision on overall levels of expenditure.

4. Top down

Participatory Budgeting has always been initiated by a “top down” procedure and therefore runs the risk of being seen as an imposition by the council. But if PB processes are developed with citizens (through a steering group of residents, councillors, officers,
partners etc) then ownership should be mutual and not necessarily seen as solely a process of the council.

**Challenges:**

1. **Complexity and bureaucracy**

Implementing PB can be complex. It is not just a matter of turning up at a meeting of an assembly but it relies on people understanding budgets and mechanisms such as voting systems and budget matrices. It can take a number of years for PB to become effective and generate participation to achieve results. Its cost-efficiency in the early years is therefore questionable. Because of the complexity of PB it might be advisable for a local authority to start with a simple form of PB like a neighbourhood small grants scheme and gradually expand to a mainstream budget that affects a wider area.

2. **The need for strong commitment**

PB requires strong commitment from all parties involved – council officers, elected members and citizens. It requires a strong and confident administration which delivers action on the ground. People have to be convinced that its worth getting involved.

3. **The need for capacity building**

Community and voluntary sector groups require training, resources and support if they are to play a role in the PB process. Councillors and local authority officers also need training concerning the principles and the practice of PB processes.

4. **The need for time**

To get PB processes up and running requires time especially in the early years. People might find it difficult to commit the time needed to make PB successful.

5. **The danger of raising expectations**

There is a danger that the introduction of a PB process can raise the expectations of local people – expectations that cannot be met. This requires very clear information and training in order to ensure that people are aware of the true nature of the programme. Not everyone is a winner in PB, some will find that their wishes do not fit with the community agreed priorities.

6. **The need for continuity**

There is a danger that PB will be seen as a one off event. The challenge is for local authorities to incorporate PB into their budget making cycle so it becomes an established procedure that increases the sense of citizenship and deeps participatory and representative democracy.
Participatory Budgeting can be applied to many different contexts where priorities have to be made and budgets set in the allocation of public funds. Most, but not all, of the PB initiatives in the UK to date have been applied to the allocation of small grants.

Small Grants Schemes

Participatory budgeting small grants schemes have been set up using money allocated from a variety of sources including neighbourhood renewal funds, community council precepts, local strategic partnerships, neighbourhood management funds, new deal for communities funds and housing funds. They provide an immediate connection between decision making and spending, are highly participatory and create a real local feel to the process of allocating resources. Small grants schemes help foster social cohesion as they bring local people together and they can help to develop a closer working relationship between officers, councillors and the community. These schemes can be applied to geographical neighbourhoods and also to communities of interest such as children and young people.

However, small grants schemes are by their very nature limited in their scope. They are not linked to mainstream budgets or city-wide themes or priorities and often they are dependent on time limited funding so may not be repeatable. These processes also tend to be resource intensive for relatively small amounts of money. But small grants schemes, using PB, provide a useful and important first stepping stone to scale up to more ambitious activities. They also give citizens the experience and knowledge to get involved in wider (across the local authority area) and deeper (larger allocation of mainstream money) PB processes.

Devolved Mainstream Budgets

Participatory Budgeting can be applied to some local authority mainstream budgets. Part of these
Budgets can be “top-sliced” and allocated to wards or neighbourhoods to be spent according to residents’ priorities. In this way residents influence the council’s departmental priorities. In 2005 part of Salford’s highways budget was devolved to a community committee in the neighbourhood Claremont and Weaste where local people prioritised and choose new road and traffic management schemes to spend the money on.

Creating devolved mainstream budgets can involve new investment money and not just revenue funding for existing services. The scope for this type of PB activity is potentially wide and could include sections of environmental, leisure and recreation budgets and housing budgets.

Annual Budget Consultation

Most local authorities carry out a yearly budget consultation with the public. But this is often limited to paper correspondence and has a limited time scale. If the consultation process started at the beginning of the budget year, instead of the end, there would be scope to apply a PB process. Such an approach would help to develop a more mature debate about the whole of the council budget and the use of local taxes. Residents’ assemblies or similar structures would have to be organised across the local authority area with a representative residents’ forum coordinating the priorities and decisions and monitoring progress on budget expenditure. This type of PB exercise would be require developing residents understanding local authority income, expenditure and budgets and might involve budget literacy programmes to provide people with the necessary background knowledge. With this kind of activity, although residents may only have direct say over a small proportion (for example 2-5%) of discretionary budgets, they would need to be aware of what the rest of the budget is spent on in order to make informed decisions.

Local Area Agreements

Local Area Agreements (LAAs) are agreements that are drawn up between the government and local strategic partnerships (LSPs) on key national and local targets. From 2007 LSPs (a partnership of statutory and non-statutory agencies) have become a mandatory requirement for all local authority areas and it’s their duty to develop and monitor action plans, that is the LAA. The overall aim of the LAA is to deliver better local services in an area through improved partnership working.

Local Area Agreements and PB share many common principles including: an emphasis on meeting local priorities, area based working, partnership, strong local accountability to communities, revitalising local democracy, community engagement, streamlining of funding and making the best use of resources.

LAA provide “wider” and “deeper” opportunities to apply PB processes to the pooled budgets of local authorities, primary health care trusts and the police. Since LAA function on a 3 year cycle, longer term PB processes could be adopted that include reviews and monitoring of budgets and expenditure.

Other Options for Participatory Budgeting

Other possible options for using a participatory budgeting approach include the allocation of funds from the following:

- The Neighbourhood Police Budget (especially relating to community safety), possibly through a neighbourhood management scheme as recommended in the Flanagan Report
- Specific areas of Primary Care Trust budgets
- Youth Opportunity Fund and the Youth Capital Fund which central government has set up to give young people money for activities and facilities in their neighbourhoods. The idea is that these funds also involve young people in the funding decisions
- Housing Association budgets where tenants might be involved in setting priorities and budgets for communal facilities, environmental improvements and housing renovation programmes.

Local Authorities are not confined to choosing one particular PB option. A selection of initiatives could run in tandem. But all options need a political will and an investment of time and energy on the part of officers, elected members and local residents.

Neighbourhood charters, set-up under some LSPs, provide a bottom up mechanism to involve local communities in prioritising services and outcomes for their local areas.
### Policy, Funding and PB Processes

<table>
<thead>
<tr>
<th>Enabling Policy framework</th>
<th>Source of funding</th>
<th>Small grants schemes</th>
<th>Mainstream (top slicing) devolved to neigh’hood ward or village</th>
<th>Main Stream LA wide Budget consultation</th>
<th>LSP Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong and Prosperous Communities</td>
<td>Neighbourhood Renewal Funds</td>
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<td>Investments for LA mainstream budgets</td>
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<td>The overall council budget</td>
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<td>Review of Policing by Sir Ronnie Flanagan</td>
<td>Neighbourhood policing budgets</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Our NHS, Our Future. Operating Framework for 2008/9 LGPHI Act 2007</td>
<td>Primary Care Trust Budget</td>
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<td>✔</td>
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<td>Youth Matters Green Paper</td>
<td>Youth Opportunity Fund Youth Capital Fund</td>
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<td>Primary Care Trust Budget</td>
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7. The Ingredients of PB

The ingredients of Participatory Budgeting will vary according to the local context but an evaluation of the pilot PB pilot projects in the UK identified some common factors.

**Key Design and Planning factors which influence the development and implementation of PB**

**Community Engagement**

- Skills and resources are needed to engage local community organisations.
- Skills and time are needed to target these groups
- Skills and time are needed to build community capacity to participate

**Leadership**

- Having strong leadership, either from local authority officers or elected members, to motivate others and overcome blocks is very important.

**Planning**

- Time allocated to briefing local residents and community groups on the process is important.
- Finding a process that that works for the local situation and is easily understood is essential. This planning can be carried out either by local authority officers or external consultants.

**Learning**

- Learning from others who have carried out similar processes can be helpful.
- Opportunities should be created during the process to reflect on events.

**Communications**

- Communication of the PB idea is important. It is helpful if it is branded in a different way to other local authority communications. A range of methods should be used to communicate the idea to the widest possible audience.

**Support**

- Many of the pilot PB initiatives found the support of the PB unit very helpful.
- Having a commitment to community development in...
lead local authority departments has proved to be very supportive.

Resources
Setting up a project team within the local authority, perhaps representatives from the local authority, voluntary organisations and residents, is necessary to mobilise resources and support as well as drive the process forward.

It is important to identify early on support that may be available from other organisations and partners.

Money
Knowing how much money is available and the nature of that money is crucial from the early stages.

Key factors contributing to success
The following factors have been identified in contributing to a successful PB process.

Meeting Structure
All meetings with residents need to be well structured and engaging. It is often useful to employ the services of a professional facilitator.

Communication
There needs to be clear instructions and information given to residents about the process, especially concerning the method of scoring priorities and projects to be used.

There needs to be clear communication about the amount of money available to be allocated. Also, constraints attached to the allocation of money such as geographical coverage and themes.

Inclusiveness
Consideration needs to be given to the time and venue of meetings to maximise attendance.

There should always be opportunities for people to ask questions and answers made available.

Support should be provided for participants with specific needs such as child care, hearing loop, signing, large print information materials.

Additional Information
There needs to be a balance between enough information and information overload.

Advice and support should be provided for those project holders who are unsuccessful in securing funding through the PB process.

Additional Support
In small grants schemes participants may need support in getting costings for project proposals. They also need support on planning the delivery of their project/s.

Adaptability
All PB processes must be designed to fit the local circumstances.

Care must be taken to fit the available technology to the needs of the process rather than the other way round. If it is too “techy” it may alienate older people, however this might engage younger people.
8. The Role of the Participatory Budget Unit

The PB Unit was set up in 2006 by Church Action on Poverty (a UK charity) with the support from Oxfam’s UK Poverty Program and other partners.

The unit receives funding from the Department of Communities and Local Government and further income is generated by providing support for PB pilots in England and Wales as well as training events and research work.

The unit aims to promote the use of PB in different statutory bodies, so as to give local citizens a greater say in the allocation of public resources. To achieve this, a network of associates has been set up, who can offer training and advice in PB work to residents, local authorities, other statutory agencies and third sector agencies.

The core PB Unit team currently (March 2008) comprises:

**Mark Waters**
Mark Waters, the Chief Executive for the PB Unit. He has undertaken research in Brazil and Canada to look at developing PB in the UK. He travels extensively across the UK supporting new PB work.

**Alan Budge**
Alan Budge formerly worked for Bradford Vision and works part-time for the unit. He has been closely involved with many of the innovative PB programmes in Keighley and Bradford and brings practical experience both of delivering PB and from being the neighbourhood partnership manager for Keighley.

**Jez Hall**
Jez Hall works part-time for the unit, mainly on the dissemination of data and research. He maintains links with European bodies working on PB and has written and presented widely across the UK, including on training days and at conferences. The rest of his time he works at Lancaster University on social enterprise issues.

**Lorraine Shaw & Jenny Lazarus**
Lorraine Shaw and Jenny Lazarus provide administrative and other support to the PB Unit and other projects of Church Action on Poverty.
Ruth Jackson
Ruth Jackson is the unit’s Research & Information Officer. Ruth previously worked for a local authority undertaking research into innovation and best practice. She supported the council in developing strategies around neighbourhood renewal.

Phil Teece
Phil Teece is the unit’s Programme Manager. Phil previously worked for over 30 years as a civil servant in several departments. His background is senior operations and programme management. Phil has volunteered for over 25 years with Oxfam and also volunteered in Peru for a number of months.

The Participatory Budgeting Unit provides the following services:

Research
- Policy development and good practice happening in local authority areas across the country.
- Specific local authorities’ activities relating to participatory budgeting.

Accompaniment in developing and delivering participatory processes
- Budget literacy work with various stakeholders using a range of participatory tools.
- Support in developing community engagement activities and capacity building processes to enable active participation in PB pilots.
- Facilitation of planning meetings and partnership working.
- Working with local authorities to enable bureaucratic structures to be less visible and provide more ownership of meetings to local people.

Technical support
- Workshop facilitation with neighbourhood managers, community development workers, councillors and community members
- Support with the development and delivery of participatory processes
- Support with the development of technical tools, including budget matrices, policies, rules, etc.

Evaluation and monitoring throughout PB process
- Development of a framework for baseline monitoring, indicators and targets
- Facilitation of participatory evaluation
- Report writing and dissemination internally and externally
- Providing further support from:
  - PB Practitioners’ Network - opportunity to share learning with other pilot areas
  - National Reference Group meetings - opportunity to share learning with senior government policy makers
  - International networks

Our services are particularly suitable for organisations wishing to:
- Develop more participatory and inclusive processes in their budget decision making
- Build capacity within their organisations and the wider community around budgets
- Analyse the relationships between budget decision making and social inclusion
- Develop a commitment to inclusion and participation
Five different case studies have been selected to highlight different situations, types of budgets and targeted beneficiaries. Although different, each case study has the following common elements:

1. The mobilisation of local residents or communities of interest.
2. The prioritising of needs and themes by local residents which are then translated into schemes and projects.
3. The allocation of earmarked public funds, by local residents, to competing projects or schemes.

### The five case studies used are as follows:

<table>
<thead>
<tr>
<th>Project</th>
<th>Local Authority</th>
<th>Budget</th>
<th>Target Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Village Spend, Coedpoeth, Wales</td>
<td>Coedpoeth, Community Council</td>
<td>Precept funds for village-wide use</td>
<td>All the residents of the village</td>
</tr>
<tr>
<td>2. Keighley Decision Day</td>
<td>Bradford Vision – Local Strategic Partnership</td>
<td>Neighbourhood Renewal Funds, Local Area Agreement funds</td>
<td>Residents in 7 neighbourhoods of Keighley town</td>
</tr>
<tr>
<td>3. Salford Highways PB</td>
<td>Salford City Council</td>
<td>Council’s mainstream highway budget</td>
<td>Residents in the area of Claremont and Weaste</td>
</tr>
<tr>
<td>4. U-decide</td>
<td>Newcastle City Council</td>
<td>Neighbourhood Renewal Funds</td>
<td>Children and young people across the city</td>
</tr>
<tr>
<td>5. Harrow Open Budget</td>
<td>London Borough of Harrow</td>
<td>Mainstream budget</td>
<td>Residents across the local authority area</td>
</tr>
</tbody>
</table>
案例 A：
村庄的花费，
科德波思，
北威尔士

摘要 2006年，社区
委员会在科德波思
使用预付款
进行PB流程。它
是由社区团体
和当地领导
推动的。传
单被发送给村
落的全体居民，
告知他们流程
并邀请他们参加
公开集会。在第一
次公开集会上，参
与者被要求
根据预先准备的主题
提出项目想法。这些
项目想法被优先
排序，六
个最喜爱的被选
出。项目想法被
估价，并在第二
次公开集会
中被批准。

同时，优先排序流
程也与小学学
生一起进行，他
们提出了项目
建议的想法。

提出的项目是：
控制
的
人行道；整
修
战争
纪念碑；公共
开放空间
的
改进
座椅；植树；午餐
俱乐部的
交通；
改善
运动
设施。
<table>
<thead>
<tr>
<th>Aims</th>
<th>To engage local residents in selecting priorities for Community Council money.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objectives</td>
<td>Engage residents in PB process with Community Council</td>
</tr>
<tr>
<td></td>
<td>Encourage new Community Councillors to come forward</td>
</tr>
<tr>
<td></td>
<td>To enable taxpayers to have a say in how money is spent</td>
</tr>
<tr>
<td></td>
<td>Develop citizenship in local school children</td>
</tr>
<tr>
<td></td>
<td>To trial the PB model in Wales</td>
</tr>
<tr>
<td></td>
<td>To engage policy makers in Wales</td>
</tr>
<tr>
<td></td>
<td>To develop a model of engagement in budgets for older people.</td>
</tr>
<tr>
<td>Where</td>
<td>Coedpoeth village, near Wrexham, Wales</td>
</tr>
<tr>
<td>Structure, Funding &amp; Methods</td>
<td>• A Village Spend Steering Group was formed from local voluntary organisations to plan the process.</td>
</tr>
<tr>
<td></td>
<td>• Priorities and project ideas identified at the first public meeting</td>
</tr>
<tr>
<td></td>
<td>• Parallel process to identify project ideas in the local primary school.</td>
</tr>
<tr>
<td></td>
<td>• Projects worked up and costed</td>
</tr>
<tr>
<td></td>
<td>• Projects prioritised and selected for funding at second public meeting</td>
</tr>
<tr>
<td></td>
<td>• Project ready for implementation by County Council</td>
</tr>
<tr>
<td></td>
<td>£20,000 precept funds were made available. This money comes from council tax and is held by the Community Council.</td>
</tr>
<tr>
<td>Who was involved</td>
<td>Coedpoeth Community Council, Help the Aged in Wales, Together Creating Communities, Association of Voluntary Organisations in Wrexham, Wrexham County Borough Concil and the PB Unit.</td>
</tr>
<tr>
<td>What did it achieve</td>
<td>Although the Village spend pilot was a small initiative it established a strong case for further PB initiatives in Wales and in rural areas.</td>
</tr>
<tr>
<td></td>
<td>Residents and school pupils engaged about what was good about their village and what needed improvement.</td>
</tr>
<tr>
<td></td>
<td>The process affirmed the work and leadership of the Community Council.</td>
</tr>
<tr>
<td></td>
<td>The process increased budget literacy.</td>
</tr>
<tr>
<td></td>
<td>There was a sense of ownership of the resulting projects.</td>
</tr>
<tr>
<td></td>
<td>The issue of putting in a pedestrian crossing led to local people building a relationship with the local Co-op Supermarket and persuading them to put money into the crossing scheme.</td>
</tr>
</tbody>
</table>
Case Study B: Keighley Decision Day, Bradford

Summary: Bradford Local Strategic Partnership, decided to distribute the 2006/07 round of Neighbourhood Renewal Funding (NRF) in Keighley using a process of Participatory Budgeting. On “Decision Day” community organisations allocated a total of £130,000 to local projects using the participatory budgeting. The Keighley process was led by Bradford Vision’s neighbourhood manager for the area with the support of the senior team.

In March 2006 it was agreed that the Neighbourhood Partnership for Keighley could use PB for the 2006/07 round of Neighbourhood Renewal Funding. Bradford Vision secured a total of £130,000 to be spent on Children and Young People, Safer and Stronger Communities and the Environment to be spent only in areas of relative deprivation and therefore eligible for NRF funds. A reference group was formed comprising Bradford Vision staff, Keighley Voluntary Services, the council’s area coordinator and a representative from the UK PB unit. Priorities were established through community events and door to door interviews. Voluntary organisations and local groups were then invited to submit bits which were then scrutinised by a panel made up of local councillors, members of the PB reference group, and staff from local statutory organisations.

All residents involved in the bidding process were then invited to a Decision Day where all the projects were presented and voted on.
**Aims**
To involve local residents in the allocation of neighbourhood renewal funds (NRF) and the Local Area Agreement (LAA)funds.

**Objectives**
- To stimulate wider resident engagement with local participatory structures.
- To develop greater resident understanding of budgeting processes.
- To increase cross-community working.
- To encourage service provider receptiveness to resident knowledge.

**Where**
In 7 processes in 7 neighbourhoods in Keighley, Bradford District Council.

**Structure, Funding & Methods**
- £130,000 was available for local projects from the NRF.
- Before the event a reference group was formed from staff at Bradford Vision, Keighley Voluntary Services, Bradford Council and the wider voluntary sector.
- Spending themes were prioritised by residents – approximately 400 responses were generated from door to door interviews and at community events.
- Local groups were invited to send in proposals - to bid for the money. Bids were then reviewed by the scrutiny panel of local service providers and councillors.
- Invitations to the Decision Day were sent to all residents in the eligible areas.
- At the event voting took place in 2 parts, 2 sessions in the morning and 3 in the afternoon. Participants were allowed 3 minutes to make their presentation and voting was carried out on paper sheets after every 5 presentations.
- After the event funds were distributed to the successful projects by Bradford Vision. Support and monitoring was provided by Keighley Voluntary Services.

**Who was involved**
Staff from Bradford Vision, Keighley Voluntary Sector, Bradford Council and the wider voluntary sector.

**What did it achieve**
The process contributed to community cohesion as there was a coming together of different communities and a greater understanding of each others different needs.
- Local people directed the allocation of NRF money for their area.
- A new community role for elected members was highlighted as local councillors were involved in the scrutiny panel, in presenting the Decision Day and in the evaluation process.
Case Study C: Salford Highways participatory budgeting event in Claremont and Weaste

Summary: Claremont and Weaste PB event in Salford prioritised an allocation of £100,000 of money devolved to the Community Committee for Highways improvements. The event was planned by a steering group, which met monthly, consisting of local councillors, council officers, local residents and a representative from the PB Unit. Existing projects form the Community Action Plan and new proposals from residents were gathered together. An event was planned to prioritise the 23 schemes that had been proposed. Costs estimates for each scheme were provided by Urban Vision, an arms length company, set up to deliver the council’s environmental works. The event was held in a local venue and information about each scheme was presented with photos, along with an accident map of the whole area. Prioritisation took place with residents scoring each scheme out of ten on score cards, and then repeating the process for the top ten scoring projects. The cost of the schemes on the prioritised list meant that based on estimates, four schemes would probably be funded. Over 50 residents attended this event.
<table>
<thead>
<tr>
<th><strong>Aims</strong></th>
<th>To involve the local community in proposing and prioritising projects for highway improvements.</th>
</tr>
</thead>
</table>
| **Objectives** | To involve a wider range and number of residents than would normally attend a community committee meeting.  
To produce a list of prioritised schemes.  
To learn from the process. |
| **Where** | Salford in the neighbourhood of Claremont and Weaste. |
| **Structure, Funding & Methods** | £800,000 was devolved to 8 Community Committee areas for Highway improvements. Claremont and Weaste Community Committee decided to allocate its £100,000 share using a PB process.  
**Before the event** project proposals were gathered from the Community Action Plan and from ideas submitted from residents. Residents were invited to attend the PB event and efforts were made to target those who didn't usually attend meetings. Project costing estimates were drawn up by Urban Vision.  
**At the event** written information and photos of each scheme were laid out on tables and a technical officer from the council was available to answer questions. Residents were given score cards to mark out of 10 the 23 schemes. The top 10 scoring schemes went through to a second round of scoring using the same process. Residents’ final scoring allowed 4 schemes to be potentially funded, subject to project estimates being correct. Finally, the residents evaluated the process using e-voting. |
| **Who was involved** | Salford City Council, (neighbourhood manager and 2 community development workers), Urban Vision, Claremont and Weaste Community Committee, the PB Unit. |
| **What did it achieve** | A DVD was produced of the event.  
New groups were brought into decision making.  
Trust was increased between service provider (the Highways department) and the community.  
The Community had a greater input into deciding how a mainstream budget was spent.  
The process demonstrated that PB can be used to decide on the allocation of part of mainstream budgets. |
Case Study D: U-decide Children and Young People’s Pilot, Newcastle.

Summary: The U-decide Children and Young People’s pilot used funds allocated by the LSP but were delivered by the local council. This pilot used a participatory grant making model in which funds were allocated either directly to community projects, or to groups who would work in partnership with the council and other service providers to deliver the ideas.

The Children and Young People’s pilot targeted its funds citywide. Publicity and a simple pro-forma was developed, accompanied by networking and outreach work with youth workers. A small group of young people – “the Wikkid Planners” – worked with a council officer to design and develop the process. They chose not to copy how others had run similar events and decided that groups should not be asked to prepare anything in advance, as this might disadvantage some groups. Instead the organisers asked the participants to prepare a brief on-the-spot presentation and make a display out of materials provided for the event. The young people attending then scored one another’s projects. 18 projects out of 22 were then prioritised for funding, and follow up support was provided after the event.
| **Aims** | To involve young people in developing, prioritising and delivering projects across the city.  
To pilot PB with a community of interest. |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| **Objectives** | To explore a new way to engage young people  
To stimulate other forms of engagement  
To learn from the process and communicate it to others |
| **Where** | Newcastle |
| **Structure, Funding & Methods** | **Before the event** four priorities for the were established from a review if children and young people’s views of their needs.  
Youth groups across the city were informed about the U-decide pilot through publicity and existing networks.  
Bids were checked for legality and each group invited form young people to the event.  
A group of young people – The Wikkid Planners” worked with a council officer to design and advise on the process.  
**At the event** youth groups were given materials to make a creative display about their project and asked to make a short presentation to the other groups bidding for money.  
Participants prioritised projects using e-voting.  
18 projects were successful in obtaining funds and 4 were unsuccessful but were given further advice on funding.  
After the event money was allocated to the groups and support given to help them spend it.  
Over 100 young people and support staff attended the event and high level of satisfaction were recorded on evaluation forms.  
**Ongoing support** and monitoring of the projects was provided by the council.  
£30,000 from the Neighbourhood Renewal Fund was allocated for the first year of this pilot scheme |
| **Who was involved** | Newcastle Council and Newcastle LSP.  
The U-decide Working Group (local young people) and the U-decide Learning Group (local young people). |
| **What did it achieve** | A DVD was produced about this PB initiative.  
Young people became involved in prioritising their needs and designing projects.  
Young people became involved in implementing their projects.  
Support and a desire from young people for a second year of U-decide PB. |
Case Study E: Harrow Open Budget

**Summary:** The Harrow Open Budget initiative was initiated by key officials in the London Borough of Harrow to open up the process of developing the 2006/7 Council budget. The local authority used a form of Participatory Budgeting whereby elements of the budget were opened up to public debate around local priorities. The mechanisms used to engage the public were a day long Open Assembly of local residents, together with an on going Panel of residents to monitor the process.

The Open Assembly agreed to a list of budget priorities and the Panel, a smaller group of residents, ensured that implementation of the budget was monitored and that there was some accountability to the participants of the Assembly. The Open Budget was initiated at a time when there had been a lot of public consultation that had not been successful in reaching large numbers of residents.
| Aims and Objectives | To rebuild public confidence in the local council decision making.  
To engage the most vociferous and dissatisfied elements of the community in considered deliberations.  
To provide a popular sense of ownership of the final budget priorities.  
To help residents understand the issues facing officers.  
To help elected officers understand the concerns of residents.  
To offer opportunities to engage the local media  
To rebuild democratic engagement and dialogue.  
To take community engagement seriously  
To increase the profile and importance of local Councillors by allowing them to engage in dialogue with Harrow residents about decisions facing the local authority. |
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Where</td>
<td>London Borough of Harrow</td>
</tr>
</tbody>
</table>
| Structure, Funding & Methods | Over 300 Harrow residents attended an open assembly in October 2003 to discuss and vote on key priorities across the council’s budget. The process allowed participants to give broad preferences for what the council should deliver.  
People voted members on to an Open Budget Panel to monitor the council’s spending and to map whether priorities identified had been addressed.  
There was a willingness by the council to invest in the PB process |
| Who was involved | Members and Officers of Harrow Council, Independent consultants – “Power Inquiry” and the residents across the Borough of Harrow. |
| What did it achieve | Increase understanding of Local Government.  
Framework for engagement. During half day workshops officers developed scenarios which could be used with the local residents of the area. Getting a sense of what the key strategic options were prior to the Open Assembly day was key. This provided a framework for public engagement which had boundaries and was absolutely clear.  
Increased understanding of budgets and the Council’s work. For those involved in the Open Budget day itself, the process received a 94% satisfaction rating as good or very good and 74% suggested that the process should be repeated.  
Continuity. The political balance has changed in Harrow Council and the process has not been repeated. Also the Budget Panel has found it difficult to maintain links with the participates of the wider Assembly |
Section B:
‘How to’ guide for Participatory Budgeting

This section sets out, step by step, recommended decisions and actions that should occur when implementing two different kinds of participatory budgeting processes.

A selection of resources has been included in the ‘hard copy’ paper format of the toolkit. Additional resources, not suitable for paper format, and new resources under development can be found at www.participatorybudgeting.org.uk.

The first step by step guide is for a small grants process, which has four key stages broken down into smaller, individual decisions and actions with resources to help at each key stage.

The second step by step guide is for a mainstream budget process either at a neighbourhood or local authority area level. This process has three key stages with a number of sub-processes within each stage.

It is important to say that these are not the only ways that PB processes can be implemented; different ways of implementing PB are still being piloted and developed in the UK. However, the steps should provide some guidance on how a process could be developed. Furthermore, this section only provides two different kinds of PB processes, the most common currently in the UK, and should not be considered the limit of PB processes that could be implemented. Section A provides further information on other PB processes. As new processes, and variations on processes, are developed these will be added to the PB Unit’s website.
## 1. Small Grants Process

This could be money allocated through a number of different budget lines and is often external funding linked to the local authority or its statutory partners.

<table>
<thead>
<tr>
<th>Stages</th>
<th>Resources and Material Available</th>
<th>Case Studies and Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preparations</strong></td>
<td></td>
<td>Keighley small grants Case Study</td>
</tr>
<tr>
<td>1. Form Steering Group to drive the process forward.</td>
<td>Appendix A: your chance to decide</td>
<td></td>
</tr>
<tr>
<td>2. Identify the budget and pot of money to be distributed.</td>
<td>Appendix B: proposed time line</td>
<td></td>
</tr>
<tr>
<td>3. Adopt a name for the process.</td>
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<tr>
<td>4. Prepare briefing and publicity material.</td>
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<tr>
<td>5. Adopt minimum standards.</td>
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<tr>
<td>6. Agree initial themes</td>
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<tr>
<td>7. Agree timetable and calendar of events</td>
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<td></td>
</tr>
<tr>
<td>8. Draw up indicators for evaluation purposes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Initial Ground Work</strong></td>
<td>Appendix C: what matters most to you</td>
<td></td>
</tr>
<tr>
<td>1. Consultation (this could be interviews, questionnaires, meetings) with residents across the eligible neighbourhoods to establish themed priorities e.g. health, environment etc.</td>
<td></td>
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</tr>
<tr>
<td>2. Voluntary, Community and statutory providers invited to bid into the pot of money.</td>
<td>Appendix D: invitation to bidders</td>
<td></td>
</tr>
<tr>
<td>3. Information packs and applications sent to interested groups along with findings from residents' survey.</td>
<td>Appendix E: information sheet FAQ</td>
<td></td>
</tr>
<tr>
<td>4. Project proposals submitted to a “technical scrutiny panel” this could be elected members, residents and officers. The purpose of the panel is to feed back to applicants concerns regarding legality and health and safety. This is not a selection procedure.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Residents in the eligible area are invited to a decision making event to vote on the projects.</td>
<td>Appendix F: invitation letter</td>
<td></td>
</tr>
</tbody>
</table>
### Stages

#### The Decision Making Event
1. Residents are registered and given a voting number and voting forms.
2. Projects are presented by those seeking funding.
3. Those present give a score out of ten for the projects.
4. At the end of the day the votes are collated and results are announced.
5. Evaluation of day.

#### Follow-up procedures
1. Successful projects receive funding and begin project delivery.
2. Follow-up meetings of local scrutiny panel (including residents) to monitor project delivery in the neighbourhoods.
3. Planning for following year small grants participatory budgeting process.

### Resources and Material Available

- See DVD of Keighley Decision
- Day available from www.participatorybudgeting.org.uk
- Appendix G: hints on scoring sheet
- Appendix H: small grants matrix
- Appendix I: bingo sheet evaluation
- Appendix J: sample contract

### Case Studies and Examples

A percentage of the mainstream budget across a neighbourhood or entire local authority area

### Local Authority Preparations:

1. Form a steering committee – these are the people responsible for driving the process forward. The committee composition will vary but could include both officers and members and representatives from third sector organisations.
2. Identify budget from discretionary expenditure which is open to a PB process.
3. Prepare briefings and materials
   - Local name of process Adoption of minimum standards such as constitution, membership, inclusion policy, meeting procedures.
   - Agree initial themes
   - Agree timetable and budget cycle
   - Draw up budget for implementation
   - Publicity and Communications material

### Resources and Material Available

- In Salford PB was used to allocate funds from the Highways Budget in the east of the city. See Case Study.
- In Newcastle brand name is “U Decide”.
- In Coedpoeth brand name is “Village Spend”.
- In Harrow brand name is “Harrow Open Budget”.

### Case Studies and Examples
• Draw up indicators for evaluation purposes.

Compiling Data and Information
1. Map out existing community networks, types and levels of resident participation.
2. Generate list of stakeholder groups such as residents’ groups, faith groups tenant organisations, private sector.
3. Identify key community link organisations
4. Produce initial briefings to inform link organisations
5. Establish first year residents budget committee to “promote the idea of PB and to make policy regarding:
   • Budget size
   • Themes
   • Calendar of events

Doing PB - Going “Live”
1. Budget Literacy information and Workshops
2. First round of geographic (neighbourhood) meetings for all the community where the following will take place
   • Priority setting
   • Project identification
   • Election of representatives for new “budget council”
3. Budget council meets to review returns
4. Projects submitted for technical review
5. Calculation of budget matrix
6. Budget Council receives reports of budgets and matrix
7. LA approves the PB report
8. Budget council monitor budget expenditure and implementation.
9. Budget cycle starts again

Appendix K: simplified annual cycle
Appendix L: annual PB and Planning cycle

See “Rough Guide to Public Budgets” publication at www.participatorybudgeting.org.uk

Appendix M: Budget quizzes

Appendix N: Priority setting and project identification exercise

Appendix O: example of developing budget matrix
Appendix P: flowchart of annual PB cycle

Buile Hill, Salford
Barking Billions, L B Barking and Dagenham
PARTICIPATORY BUDGETING
YOUR CHANCE TO DECIDE HOW THE MONEY IS SPENT IN YOUR NEIGHBOURHOOD

During the last two years, as part of the [insert name of neighbourhood arrangement e.g. neighbourhood management, new deal for communities, working neighbourhoods fund] process, over £[total grants funding available] was spent in [local area], providing benefits to disadvantaged neighbourhoods, such as
- Sports activities for young people;
- Security measures;
- Estate clean ups;
- IT classes for young people and adults;
- Development of safe play spaces for local children.

In [insert next year(s)], similar resources are being made available to further improve neighbourhoods. The aim this time is to directly involve local people in deciding how this money is spent. Through the process outlined below, the projects that receive the most votes will be the ones delivered in your neighbourhood.

**Step 1**
Complete a simple form saying what matters most to you, e.g. issues relating to young people, the environment, etc.

**Step 2**
The information you provide will help to decide how much money will be available for each theme (the themes are listed on the form). For example, if most people want the money to be spent on activities for young people, then that is where most of the money will be spent.

**Step 3**
Service providers, agencies and local people will put together project proposals which target priorities. If you have an idea yourself and are confident you can deliver it, you can put forward a proposal, too.

**Step 4**
These proposals will be looked at and graded by a group of workers/residents with local and/or technical knowledge, to help 'fine tune' the practical aspects of project delivery.

**Step 5**
The proposals will be presented at an event held centrally in [local area]. The proposals will then be voted on by residents of the neighbourhoods who will benefit. The projects with the most votes will be approved, until all the money has been allocated.

**Step 6**
Residents nominated from neighbourhoods will meet to check on the progress of project delivery.
Appendix B:

PARTICIPATORY BUDGETING

PROPOSED TIME LINE

<table>
<thead>
<tr>
<th>[insert year]</th>
<th>July/August</th>
<th>Consultation in neighbourhoods.</th>
</tr>
</thead>
<tbody>
<tr>
<td>September/ October</td>
<td>Project proposals invited and submitted. ‘Experts’ (people with local and/or technical knowledge) offer feedback and grade proposals in terms of ‘fine tuning’ the practical aspects of project delivery.</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>Proposals voted on by neighbourhood residents.</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>‘Panel’ of residents elected to help monitor project delivery.</td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>Money paid out to begin project delivery.</td>
<td></td>
</tr>
<tr>
<td>[insert year]</td>
<td>Panel of residents and technical ‘experts’ meet three monthly to check on project progress.</td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>Projects completed.</td>
<td></td>
</tr>
</tbody>
</table>

APPLICATION FORM AND FURTHER INFORMATION

For a project application form, please contact [insert name and contact details of organisers]

For further information, please contact [insert name and contact details of person responsible for information if different from above]
Appendix C:

PARTICIPATORY BUDGETING

What Matters Most to You?

**Age range** *(please tick appropriate box)*

<table>
<thead>
<tr>
<th>Under 16</th>
<th>16-24</th>
<th>25-34</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>65 or over</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Your postcode**

---

**Your contact details** *(optional)*

**Name:**

**Address:**

---

**Contact telephone numbers**

**Home:**

**Mobile:**

*Please complete this section if you require us to send you an invitation for the Participatory Budgeting event.*
Please list your top three priorities on this form (please mark these 1-3)

<table>
<thead>
<tr>
<th>THEME</th>
<th>YOUR PRIORITY NO.</th>
<th>EXAMPLES OF ISSUES</th>
<th>SUGGESTED SOLUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAFER COMMUNITIES</td>
<td>1</td>
<td>Tackling crime, disorder, anti-social issues, and problems of drug and alcohol misuse to make neighbourhoods safer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>CHILDREN AND YOUNG PEOPLE</td>
<td>1</td>
<td>Improved provision for young people taking their wishes into account.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>ENVIRONMENT</td>
<td>1</td>
<td>Managing open spaces, litter, waste disposal, pollution and promoting environmentally friendly living.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>HEALTH</td>
<td>1</td>
<td>Improved health resources - doctors, dentists, etc. Increased availability of healthy eating, fitness programmes, etc.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>LEARNING</td>
<td>1</td>
<td>Improving learning provision across the district and promoting lifelong learning.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>HOUSING</td>
<td>1</td>
<td>Affordable, well maintained housing for all.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>ECONOMY</td>
<td>1</td>
<td>Setting up new businesses, creating new jobs and safeguarding existing jobs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>OLDER PEOPLE</td>
<td>1</td>
<td>Improved services for older people and recognising the contribution they make.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>SPORT, LEISURE AND RECREATION</td>
<td>1</td>
<td>Improving sports and entertainment provision for local people.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>
Appendix D:

PARTICIPATORY BUDGETING

Information to Bidders

Your Reference No.:
[INSERT DATE]

Dear

YOUR INVITATION TO THE [INSERT AREA NAME] PARTICIPATORY BUDGETING PILOT EVENT, [INSERT DATE OF EVENT]

TIME: [INSERT TIME OF EVENT]
AREAS: [INSERT WHICH NEIGHBOURHOODS/THEMES THE EVENT COVERS]
VENUE: [INSERT VENUE]

The event will consist of two sessions – the morning session will cover funding for projects in [insert names of neighbourhoods/themes] and the afternoon session will cover funding in the [insert neighbourhoods/themes] areas of [local area name].

What will happen on the day?

Projects will be presented to residents in turn, and residents will score each project between 1 and 10. The projects with the most votes will be eligible to receive funding.
You are asked to make a **3 minute** presentation in support of your project, to include:

- What you will do;
- What difference the project will make;
- How much it will cost.

Residents will also have information packs with written details about each project (based on the application you have already submitted).

You are welcome to hold up posters, pictures, etc. to support your bid but **no electronic aids** can be used (eg Powerpoint, etc.) This is to prevent technical hitches on the day.

The aim is to make the most effective presentation in the time available but remember the **3 minute rule** will be strictly observed so that:

(a) we can get through all the proposals in the time available;
(b) the process is fair for everyone (if some people present for longer, the residents will receive more information about some projects than others) and
(c) the attention of the resident audience stays focussed.

We suggest that you try to keep your presentation simple and to rehearse prior to the day.

[organisation/agency organising event] is planning to video and photograph the event to capture the enthusiasm and essence of the day. Should you **not** wish to be videoed or photographed, please speak to a member of [organisation] staff on the day.

**Remember:** if you do not make a presentation on the day, your project will not be considered for funding. Please can you therefore inform us **[insert date for withdrawal]**, if you wish to withdraw your application for any reason.

Please arrive on time and be prepared to stay for the whole session to hear the results. The running order will be available on the day.

**Can I take part in the voting?**

If you are a resident in one of the eligible neighbourhoods, you can vote (including one vote for your own project) otherwise no, the decision makers are exclusively the residents.

Please feel free to invite any residents who support your project.

There is £[insert total grants pot] available in total and we have received bids in excess of £[total of grants received], so there will be some successful and some unsuccessful projects. The voting system is designed to ensure that each neighbourhood receives a minimum allocation (based on population figures) to ensure fair distribution of funds.

We look forward to seeing you on [date of event].

Yours sincerely

[insert name of event organiser, title and contact details]
Appendix E: PARTICIPATORY BUDGETING

Information Sheet FAQs

Question 1: What is Participatory Budgeting?

Participatory Budgeting (PB) is an innovative way of allocating resources. Residents vote on which project proposals will be delivered in their neighbourhoods, thereby participating directly in the budget allocation of resources aimed at improving local services, in this instance neighbourhood renewal funding allocated to [insert local area].

Question 2: Where can projects be delivered?

Anywhere within the following areas: [insert neighbourhoods/themes covered] (see map). These are areas/themes eligible for [insert name of (external) funding] as per Government deprivation guidelines.

Question 3: Who can apply?

Any group or organisation which can deliver projects within the areas above, as long as
(a) the group is constituted/has agreed terms of reference;
(b) has a recognised organisation that can act as banker – either the group itself or, for example, a school, church, mosque, etc. ;
(c) is able to demonstrate compliance with relevant statutory requirements, eg CRB checks for work with children, planning permission for building works.

PLEASE NOTE: Assistance can be made available after the initial applications have been received to support groups with (a) to (c) above.

Question 4: Can statutory organisations submit applications?

Yes, as long as the money applied for is not used to replace existing mainstream provision.

Question 5: How much can be applied for?

Project proposals are invited for between £[insert minimum and maximum grant allocation]. Organisations can submit more than one bid provided the total amount does not exceed £[insert maximum amount]. For example, a community centre might want to make environmental improvements and run a programme of children’s activities. Two separate bids would be required, not to exceed £[insert maximum amount] in total.
Question 6: Why do we have to specify which theme the proposal falls under (eg children, environment, etc.)?

This is to allow for appropriate allocation of funds as clearly as possible. Residents have been asked to identify their priority concerns and the money available under each theme reflects this – it would be too complex on the voting day to apportion project costs accurately across these themes.

Question 7: How much detail is required regarding the project?

The application form is designed to be simple to complete. However, the more relevant information that can be included in the space provided, the better. A reasonably detailed budget breakdown is also helpful in the assessment of projects.

Question 8: Once the Application Form has been submitted, what happens next?

The applications will be considered by a small panel, drawn from local residents, elected members and workers with relevant ‘technical’ knowledge, eg finance planning, etc., to check the applications for legal or practical delivery issues. This is NOT a pre-selection process. Any concerns will be fed back to applicants and amended applications invited. The aim is to ensure the applications have the best chance of success.

All applicants will then be invited to the PB voting event [insert date of event] where they will be asked to make a short (3 minutes) presentation to residents from the relevant neighbourhoods (this presentation to be supported by the original application details, which the residents will receive in booklet form on the day).

Residents will vote on the proposals, which will be presented in themed blocks so, for example, all the environmental projects will be presented, then all the housing projects, etc.. This will help residents compare like with like in the voting process.

The projects with the most votes will receive funding and subject to conditions at Question 3 above being met, monies will be issued to groups as soon as possible with a view to beginning spending at the beginning of [insert year].

Question 9: What if there are any other concerns about the application/presentation process?

[insert name(s) of organisation(s) running in event] will be happy to answer any queries by telephone/email, both prior to submission of applications and in the run up/follow up to the PB event.
Appendix F:

PARTICIPATORY BUDGETING

Investigation Letter

[Insert date]

Dear Resident

Doing anything on [insert date of event]?
Can you spare half a day to decide how money should be spent to improve your neighbourhood?
We invite you to Decision Day on

[insert date of event]
at the [insert location]
[insert time]

We provide:
- £[total amount of grants pot] and proposals on how to spend it (funds for [insert themes/neighbourhoods], etc.)
- Free lunch and refreshments
- Free childcare
- Free transport

You provide:
- Your local knowledge
- Your vote!

The projects with the most votes are the ones that get the money: the results are announced on the day.

You decide. It's as simple as that!

If you would like to come ...

Who can attend?
If you have received this letter, then your address is in one of the qualifying neighbourhoods so you are welcome to come along.

What will happen on the day?
You will listen as people from different organisations present their ideas for improvements to local neighbourhoods. You will be asked to mark each idea from 1 to 10. The scores will be collected, added up and the ideas with the most votes in each neighbourhood will receive funding.

How do I get there?
The [insert name and address of location].

Please feel free to make your own way to the Centre. If you need transport, coaches (free service) will leave from:

<table>
<thead>
<tr>
<th>Braithwaite/Guardhouse</th>
<th>Whinfield Centre, Braithwaite Avenue, Keighley, BD22 6HZ</th>
<th>12.00 noon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stockbridge</td>
<td>Monty's Cafe (outside), Bradford Road, Keighley, BD21 4AW</td>
<td>11.45am</td>
</tr>
<tr>
<td>Eastwood</td>
<td>Sangat Centre, Marlborough Street, Keighley, BD21 3HU</td>
<td>12.00 noon</td>
</tr>
</tbody>
</table>
Please complete the appropriate section of the Reply Slip should you require transport.

Do you need childcare?
Free childcare is provided but we need to know in advance should you require this. Please complete the Reply Slip.

Will I have to stay for the whole morning?
Yes, to make sure the voting system is fair to everyone.

What if I’m late?
Unfortunately, and again to ensure fairness in the voting process, we cannot admit any latecomers to the event and they will be unable to take part in the process.

It would help us to know beforehand if you are coming, by completing the Reply Slip below, but please feel free to turn up on the day. However, if you need childcare, transport or have any special dietary needs please ensure that you complete and return the Reply Slip below to reach us by [insert date for receiving reply slip].

If you require any further information, please contact us on (01274) 433987.

Remember, this is your chance to decide how money is spent in your neighbourhood.

Yours sincerely

[Insert name, address & contact details of organiser]

X

REPLY SLIP

I will be attending the Participatory Budgeting Event on [insert date of event].

<table>
<thead>
<tr>
<th>Name:</th>
<th>Postcode:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you require childcare?</td>
<td>YES/NO*</td>
</tr>
<tr>
<td>No. of children</td>
<td>Age(s): ................................</td>
</tr>
<tr>
<td>Do you require transport?</td>
<td>YES/NO*</td>
</tr>
<tr>
<td>Pick up point (please circle as appropriate):</td>
<td>Sue Belcher Centre</td>
</tr>
<tr>
<td>Do you have any special dietary requirements?</td>
<td>(please state)</td>
</tr>
</tbody>
</table>

*Please delete as appropriate.

Please return this Reply Slip to [insert name & address of organiser], to reach us by [insert date for returning reply slips].
Appendix G:

PARTICIPATORY BUDGETING

Hints for Scoring

CLEAN, GREEN, SAFE NEIGHBOURHOOD

Hints for scoring the projects.

- Each person will have three minutes to tell the audience about their idea.
- You will hear about five projects and then be asked to give them each a score.
- When you have scored the first 10 we will collect the top three sheets in. (Just tear of the sheets and pass it to the end of the row). You will do the same for the next 10 and so on.

You will score between 1 and 10.

Remember: you are not judging the presentation skills of the people you are listening to, but whether their project will help make neighbourhood environments better places to live in.

Scores:

8 to 10 points Excellent idea that will make a lasting difference.
4 to 7 points Good idea, I do support the idea.
1 to 4 points Weak idea, I do not support this idea.

Please note: YOU CANNOT VOTE FOR YOUR OWN IDEA/PROJECT

Applicants leaving early may not qualify for an award and their scores will be withdrawn in order to ensure fairness and equality.

You have been allocated a seat which is numbered the same as your badge number.

Please use the same seat throughout the day.
Appendix H:

PARTICIPATORY BUDGETING

Small Grants Scoring Matrix

A small grants matrix can be used when using participatory budgeting to allocate a small grant's fund at a neighbourhood or at a ward level. Local residents and groups are given the opportunity to present projects that address specific needs of the area. They then have the responsibility of voting, using a score out of 10 (10 being the top mark) for each project. This is done after residents have listened to presentations from the different groups seeking funding. People cannot vote for their own projects.

Scorers are generally given some simple criteria to score against. Such criteria might be things like:
Does it address the needs of the area?
Does it offer value for money?
Will it work to improve the problem the project identifies?
Does it help community cohesion, volunteering, young people etc

Each scorer is given a set of project scoring cards, see below, with a project number and the project title for each bid being presented, and then a box to enter the score. At the top of the score card there is a reference number which all scorers receive on arrival for the day's voting event.

If there were 30 projects presented then there would be 29 people (or teams of people) voting, since it is not permissible to vote for your own project. It follows that the maximum that a project could score would be 290 (29 x 10). Often it is sensible to set a "floor"; a minimum score that a project needs to reach to be fundable. This could be "4 out of 10". So this means that unless a project exceeds (4 x29) it could not be funded.

The cards are collected during or after the presentations and tabulated. The projects with the highest scores are funded in descending order until the allocation of funding has been exhaust.

Variations can be made to this methodology and to the scoring cards. One variation might be to make any member of the geographical community, in question eligible to vote or to have a special session for youth project where only those under the age of 25 could vote. The scoring card could also be adapted to provide more information of to incorporate a different voting system.

(More details can be found in the Keighley case study)
Small Grant Scoring Matrix

Your reference Number ..........

| Project No. | What will they do? | Amount Required | Comments/Notes | Score 1-10  
(10 = good idea  
1 = weak idea) |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Xx1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xx2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xx3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More projects:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Voice Your Choice checklist – cross a box if any of these things happen today!
For a free Voice Your Choice prize, please tell us what you think. Use the empty boxes or the back for other comments.

<table>
<thead>
<tr>
<th>I'm having a good time</th>
<th>I wouldn't do this again</th>
<th>I asked for something in advance and it's here</th>
<th>I'm worried my kids aren't happy</th>
<th>The day is well organised</th>
<th>The time is going quickly</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't like the food</td>
<td>I feel this is good for our neighbourhoods</td>
<td>I'm not happy about voting</td>
<td>The day is badly organised</td>
<td>I think everything is being done fairly</td>
<td>The voting seems quite easy</td>
</tr>
<tr>
<td>I would do this again</td>
<td>I fancy getting involved in this sort of thing again</td>
<td>I'm not sure what it's all about</td>
<td>I wouldn't tell other people about Voice Your Choice</td>
<td>I like the venue</td>
<td></td>
</tr>
<tr>
<td>I feel a bit bored</td>
<td>The ideas could be better</td>
<td>All the projects would be good for the area</td>
<td>Everything seems to take ages</td>
<td>I don't like the venue</td>
<td></td>
</tr>
<tr>
<td>I find the voting procedure confusing</td>
<td>I might do this again</td>
<td>I'm not having a good time</td>
<td>Everyone can take part</td>
<td>My kids are being well looked after</td>
<td></td>
</tr>
<tr>
<td>I might tell people about Voice Your Choice</td>
<td>The food is great</td>
<td>I don't think the way it's done is fair</td>
<td>I would tell other people about Voice Your Choice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel like I'm having a real say in what will happen where I live</td>
<td>I asked for something in advance and it isn't here</td>
<td>It seems like a waste of time</td>
<td>I think it's a good way of getting people involved in their area</td>
<td>I'm happy to vote</td>
<td></td>
</tr>
</tbody>
</table>

Thanks for telling us what you think of the [insert name of PB event] Voting Event. Would you be willing to let us phone you in the next few weeks to find out more? If so, or if you want to get involved in this sort of thing yourself, please put your name, address and telephone number below.
Appendix J:

PARTICIPATORY BUDGETING

Contract

[INSERT EVENT NAME] PARTICIPATORY BUDGETING

Contract Agreement for "[insert name of grant] Participatory Budgeting" grant between [insert organisation responsible for funds] and:

Name of Group/Organisation: «Company»
Project Reference Number: «Ref_No»
Name of Applicant: «Full_Name»
Cheque made payable to (Banker): «Bankers_name»

1. In this document "[insert name of organisation responsible for funding]", “we” and “us” refer to [insert name of organisation responsible for funding]; "recipient", "your" and "you" refer to the organisation and persons named above, who have received a [INSERT NAME OF GRANTS POT] PARTICIPATORY BUDGETING grant. "Payment" refers to grant and "Proposal" refers to your suggestion for improvement of service. Other terms are to be understood in the context of this agreement, your application and any other correspondence or communication between you and us.

2. Acceptance of this agreement is one of the conditions of the [INSERT NAME OF GRANT] PARTICIPATORY BUDGETING grant, but other conditions may be attached to an offer. Acceptance is not confirmed until the details of the proposal/project and the amount of the payment have been agreed in writing and this agreement has been signed by both yourself and an authorised representative of [insert name of responsible organisation]. You are advised not to enter into any commitments on the basis of a conditional offer of a payment. Each party will hold a copy of the signed agreement.

3. This agreement sets out the terms under which [INSERT NAME OF GRANT] PARTICIPATORY BUDGETING payment - a grant with cash value, is to be made by [insert name of responsible organisation]. The payment is for a specific proposal/project and the associated spend is for the improvement of specified neighbourhoods in [insert local area/theme] and or service directly impacting on these areas, as outlined in your application form to us and subsequently awarded/amended at the 'Participatory Event'. The amount of the payment is also based upon funds approved at the 'Participatory Event', provision of breakdown of realistic budget and any amendments agreed between you and [insert name of responsible organisation]. Details of the agreed proposal/project and budget form part of this agreement.

4. You agree to spend the funds awarded to you in the areas you have agreed to work in as outline in your application form and subsequently confirmed or amended at the Participatory Budgeting Event. Any variation to this commitment must be agreed in writing with [insert name of responsible organisation]. Failure to adhere to this arrangement may result in your overall budget being adjusted accordingly.

5. This agreement is made with you as the representative of your group and or organisation you are employed by and in the understanding that this group/organisation will be accountable for the delivery of the proposal/project. The grant is not transferable.
6. The payment scheme is funded through public money. You agree to grant [insert name of responsible organisation], its authorised agents and statutory audit bodies access to all documents relating to the grant.

7. [insert name of responsible organisation] agrees to fund your proposal/project up to the maximum amount agreed with you. At our discretion, all or part value of the payment, may be administered by [insert name of responsible organisation] for your project.

8. [insert name of responsible organisation] is not responsible for any costs or liabilities incurred by you and your organisation in connection with the proposal/project you have applied for. You are advised to consider purchasing appropriate liability insurance, if not already covered by your group's/organisation's current policy. Any project that involves working with children must ensure that appropriate CIB checks are in place before any activity is carried out in accordance with legislation regarding children and young people. You are responsible for ensuring that you keep to the law and any relevant regulations.

9. You may not at any time claim to be a representative, employee or agent of [insert name of responsible organisation]. Should you become aware that anyone you are dealing with believes you are acting on behalf of [insert name of responsible organisation], you must make it clear that this is not the case.

10. You must mention "[insert name of responsible organisation]" and "[insert name of external funding pot, if applicable]" in any publicity material for your project, but each time you wish to print or distribute anything bearing our name you must get our approval. You may not use the relevant logos without our express permission.

11. The payment may only be used for the agreed proposal in accordance with the agreed budget details. Before making any purchases you should ensure that they are covered by the agreed budget. Any alterations to the project or budget must be agreed in writing by [insert name of responsible organisation].

12. The payment is made for the period not exceeding twelve months or until [insert date by which funds must be spent], whichever is sooner, from date of this agreement (the “specified period”) and may be renewed, subject to approval by [insert name of responsible organisation]. Any alterations to these dates must be agreed in writing.

13. You certify that all information given in your application, in any additional papers you have given us and in conversations with representatives of [insert name of responsible organisation] is true and complete to the best of your knowledge and belief.

14. If the budget allows for the purchase of equipment, the items may only be bought after the purchase has been approved by [insert name of responsible organisation]. We may decide to make such purchases on your behalf. Full details of items bought must be given to [insert name of responsible organisation]. Such payment scheme assets do not become your property and may not be sold or otherwise disposed of without [insert name of responsible organisation] express consent.

15. You agree to keep full written records of what the payment is spent on and to obtain original receipts as proof of expenditure. You agree to give [insert name of responsible organisation], other bodies appointed by [insert name of responsible organisation] full access to the accounts and to supply a progress report to [insert name of responsible organisation] every three months from date of this agreement. (Progress report includes a written report on your proposal's progress including copies of literature, income and expenditure accounts for the period. Original receipts of expenditure will be held by your organisation and allow access by [insert name of responsible organisation] on request).

16. You agree to provide a final written report and supporting documentation on completion of your proposal to show how it has matched up to agreed aims and targets.
17. You agree that all or part of any money paid under this agreement must be repaid to [insert name of responsible organisation] if:

a) you fail to apply the payment for the purposes for which it is awarded.

b) the payment money is not spent for the approved purpose within the specified period.

c) payment money is incorrectly paid to you as a result of any administrative error.

d) equipment purchased from the payment is disposed of without the express approval of [insert name of responsible organisation].

e) you do not account satisfactorily for payment money or produce acceptable original receipts.

f) you supply or have supplied incorrect or incomplete or misleading information [insert name of responsible organisation] or its agents, or if you act fraudulently or negligently in the course of completing your proposal.

g) you carry out all or part of your proposal in a way that is incompatible with [insert name of responsible organisation] policy or the law on equal opportunities and discrimination.

h) you cease to have legal control of your finances or become bankrupt.

18. Should any part of this agreement be invalid, the remaining parts retain their validity and both they and the document as a whole are to be interpreted, as far as possible, as if the whole document were valid as written.

19. Agreed budget:

<table>
<thead>
<tr>
<th>Description</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>£</td>
</tr>
<tr>
<td>2</td>
<td>£</td>
</tr>
<tr>
<td>3</td>
<td>£</td>
</tr>
<tr>
<td>4</td>
<td>£</td>
</tr>
<tr>
<td>5</td>
<td>£</td>
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<tr>
<td>6</td>
<td>£</td>
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<tr>
<td>7</td>
<td>£</td>
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<tr>
<td>8</td>
<td>£</td>
</tr>
<tr>
<td>9</td>
<td>£</td>
</tr>
<tr>
<td>10</td>
<td>£</td>
</tr>
</tbody>
</table>

TOTAL BUDGET: £
LESS 30% £
BALANCE: £

20. Please note that we are releasing [insert percentage of initial payment]% of the total payment. The remaining balance of [insert percentage of final payment]% will remain with [insert name of responsible organisation] until you/your group can demonstrate that the project is making reasonable progress and is in a position to receive the balance. This will be based on receipt of appropriate documents, as requested, i.e. quarterly progress reports, accounts, etc.

21. I accept the cheque payment of £. The remaining [insert percentage of final payment]% will be sent in due course, subject to Section 3 & 20.

22. We, the undersigned, confirm that the information we have given in the [insert name of grant pot] Participatory Budgeting Application Form and the information as detailed in this contract is true and complete to the best of our knowledge and belief.
We understand that any material omission or untrue statement may:

- lead to the withdrawal of any payment/allocation of grants
- make each of us individually liable for the repayment of any money/grant allocation
- result in legal action being taken against each of us

Data protection: Information given here will be stored by [insert name of responsible organisation]. The names of applicants, their contact details and other general information about their applications may be made public, unless otherwise agreed. Other information about applicants will not be made public without their agreement.

PLEASE NOTE THAT ALL PROJECT ACTIVITY MUST BE COMPLETED BY [INSERT FINAL DATE BY WHICH PROJECTS MUST BE COMPLETED].

This agreement is legally binding. Only sign it if you understand and accept the contents.

Name of person responsible on behalf of group/organisation: ………………………………………

Signature: ……………………………………………… Date: ………………………

Name of person responsible on behalf of banking organisation (Treasurer):

……………………………………………………………………………………………………………………………

Signature: ……………………………………………… Date: ………………………

On behalf of [insert name of responsible organisation]: ……………………………………………

Date: ………………………

Name: [officer signing on behalf of responsible organisation] Position: [position of officer]
Appendix K:

PARTICIPATORY BUDGETING

Table 2: A simplified annual cycle

The annual cycle is about bringing in a more coherent understanding of how residents need to be engaged. At its most simple we can compare it to a typical consultation cycle. External influences often mean that budget consultation with residents is compressed into the very short window from late December to the end of January. Evidence exists that few residents take up this opportunity. This is probably because they feel they have been squeezed out of this important debate and their views will have no impact on the detailed investment plans of individual departments – other than perhaps on the general level of council tax settlements. As council budgeting becomes more complex and focused on central government agendas, the opportunities for residents to influence it become even more limited.

Focusing on the annual cycle can achieve a number of benefits beyond simply improving the quality of council budgetary decisions. PB develops a shared agenda and understanding of issues by putting spending proposals into a more realistic wider context. The PB cycle contains a strong educational aspect. Learning more generally follows common patterns of information gathering, review and reflection, proposition and then decision making. Learning about these stages of project development brings together the language and ideas of the different partners. Dialogue and shared understanding takes time, and this is what PB recognises and supports.

PB requires the Council to lead on developing the cycle of meetings and consider how it engages with citizens. The council’s own internal calendar is well defined, but communities are expected to respond to less defined structures. Bringing together the internal and external processes of the Authority allow outsiders to gain a perspective of the inside. Keeping to an agreed calendar is often just common courtesy that shows mutual respect. Community Pride Initiative notes that ‘Too often, in our experience, partnership meetings are cancelled at short notice because of internal calendar conflicts. Unclear calendars and ad hoc meetings are a bad idea.’
Appendix L:

**PARTICIPATORY BUDGETING**

PB puts citizens back at the heart of the process of setting diary dates. It integrates existing consultations into one comprehensible structure, thereby reducing the burdens of consultation fatigue and partnership burden. The annual cycle declares that there is one process for consultation in each Local Authority. The community groups, voluntary organisations, and residents all use the same calendar and know when they have a role. The rest of the year, groups are free to go developing their own agendas, relieved of the need to engage with multiple consultation processes. PB encourages groups to form themselves around the submission of priorities and projects, and reduces the costs on them of participation.

Communities, particularly in areas undergoing regeneration initiatives, are constantly being asked to join in strategic partnership boards, grant award panels and forums. If they want to attract resources they are being encouraged to bid against other projects. All this activity has a severe effect upon communities, as active members become engaged elsewhere. PB clarifies how communities can get involved in resource decisions and simultaneously allows them to limit their engagement. It further helps develop a common understanding, shared with the Local Authority, on the themes, priorities and limitations of local investment.

At this point it may be worth comparing the planning cycle used for internal service investment, the consultation calendar in an average Local Authority, and the cycle of meetings under a PB annual cycle. Key to the table below is understanding at what point residents are submitting their views (in shaded boxes) in relation to the development of the plan. Our criticism of current practices is that consultation is based on choosing between prepared options for expenditure. The current norm is to not involve residents until plans have been finalised. The aim of the PB programme is to move debate so that it occurs between the right partners at the right time to produce specific ideas for making better use of new investment.

**Table 3: The annual cycle**

From the table below it is possible to see how the PB calendar allows for a set of discussions to occur throughout the year. This removes burdens from an over constricted timetable, and allows the quality of participation to improve.

<table>
<thead>
<tr>
<th>Annual Calendar</th>
<th>Service Planning Cycle</th>
<th>Consultation Cycle</th>
<th>PB annual cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>March</td>
<td>Council defines its political priorities and the likely scope of service developments through its budget reports</td>
<td>Local political manifestos are released</td>
<td>Local Council present this year's budget</td>
</tr>
<tr>
<td>April</td>
<td>Service heads consult with their departmental managers on future investment options</td>
<td>Local elections re held to select councillors</td>
<td>Local meetings establish priorities and propose projects to receive investment in the next year</td>
</tr>
<tr>
<td>May</td>
<td>Departmental managers consult on service needs with front line staff</td>
<td></td>
<td>Project proposals are submitted to service departments for technical analysis</td>
</tr>
<tr>
<td>Annual Calendar</td>
<td>Service Planning Cycle</td>
<td>Consultation Cycle</td>
<td>PB annual cycle</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------</td>
<td>--------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>June</td>
<td>Service-specific consultations begin with users for planning, monitoring and auditing reasons. Departmental managers return their comments on future service demands</td>
<td></td>
<td>Budget Council members selected</td>
</tr>
<tr>
<td>July</td>
<td>Service heads submit draft proposals for future year (often in context of their existing three to five year service plans)</td>
<td></td>
<td>The Budget Council receives reports on project proposals by relevant council departments</td>
</tr>
<tr>
<td>August</td>
<td>Executive receive first financial predictions of income and expenditure in future years</td>
<td></td>
<td>The Budget Council constructs budget tables</td>
</tr>
<tr>
<td>September</td>
<td>Council's draft budget proposals returned to service managers for comments</td>
<td>Local Authority prepares internal budget proposals and shares these with its Councillors</td>
<td>Budget Council discuss and approve Budget plan</td>
</tr>
<tr>
<td>October</td>
<td></td>
<td>Council leaders agrees draft budget proposals</td>
<td>Local authority reviews investment proposals</td>
</tr>
<tr>
<td>November</td>
<td></td>
<td>National government announces resources available for next year through Revenue Support Grant</td>
<td>Participatory budget integrated into mainstream council budgeting processes</td>
</tr>
<tr>
<td>December</td>
<td>Departments prepare end-of-year returns and ensure current budget is on target for final quarter</td>
<td>Finance department prepares budget consultation papers</td>
<td>Budget Council and Local Authority meet to prepare following year's calendar and make amendments to the rules</td>
</tr>
<tr>
<td>January</td>
<td>Consultation period</td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>Departmental managers prepare detailed service budgets</td>
<td>Consultation responses considered by Scrutiny committees and other council meetings</td>
<td>Local Authority announces its new PB programme, including reports on last year's projects and the likely level of resources</td>
</tr>
<tr>
<td>March</td>
<td></td>
<td>Mainstream Council Budget is debated and announced</td>
<td>Local meetings meet to submit new proposals</td>
</tr>
</tbody>
</table>
## Appendix M:

### Participatory Budgeting

#### Budget Quiz A

Under the banner of [insert name of quiz], we invite you to enter our....

**Budget Quiz**

*****There will be a prize of a £50 shopping voucher.****

Never been here before, so don't think you know the answers?

[insert name of local area] is typical of many local authorities. So, if you don't know the area well, it is worth making your best guess, based on your knowledge of your own local authority.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer A</th>
<th>Answer B</th>
<th>Answer C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How much does the [insert name of local authority] have to spend on services this year?</td>
<td>£10m</td>
<td>£230m</td>
<td>£490m</td>
</tr>
<tr>
<td>2. About how much do you think the [insert type of authority eg. Borough, county, city, district] plans to spend this year to provide the following services?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A primary school place for one child (per year)</td>
<td>£2,000</td>
<td>£4,000</td>
<td>£6,000</td>
</tr>
<tr>
<td>Refuse Collection from one household (per year)</td>
<td>£50</td>
<td>£100</td>
<td>£200</td>
</tr>
<tr>
<td>Providing a library service (per resident, per year)</td>
<td>£25</td>
<td>£50</td>
<td>£100</td>
</tr>
<tr>
<td>3. What percentage of the [insert type of authority] budget is planned to be spent on?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Services</td>
<td>12%</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Social Services</td>
<td>12%</td>
<td>21%</td>
<td>33%</td>
</tr>
<tr>
<td>Policemen's wages</td>
<td>0%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Health Services</td>
<td>0%</td>
<td>10%</td>
<td>28%</td>
</tr>
<tr>
<td>4. Approximately what percentage of the money the [insert type of authority] is spending this year came from:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Council Tax?</td>
<td>10%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Business rates?</td>
<td>5%</td>
<td>10%</td>
<td>30%</td>
</tr>
<tr>
<td>Central Government or other sources?</td>
<td>10%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>5. About what percentage of local residents voted over the last 3 years in the Local [insert type of authority] elections?</td>
<td>15%</td>
<td>30%</td>
<td>60%</td>
</tr>
</tbody>
</table>

**Tiebreaker question:** Use no more than 20 words to complete the tiebreaker.

(In the event of no clear winner the prize will be awarded based upon this 'tie-breaker' question.)

Residents should be interested in their Council's budget because

---------------------------------------------------------------

Entries must be returned by [insert date and time for returning quiz].

Return your entry by hand to one of the "local ambassadors" waiting at the exits to the hall, or the collection box at the reception desk. Late entries will not be able to claim any prize.

**To claim your prize you will need to give us your contact details.**

This information will not be used unless you are the winner of the "[insert name of quiz] Budget Quiz."

Your Name: ........................................ Your Contact Details: ........................................

Entries will be counted by the [section/project responsible for quiz], with oversight by the [insert name of scrutiny panel/section], and final adjudication [name, title and organization of final adjudicator].

Answers to the quiz will be posted on our website soon: [http://www.participatorybudgeting.org.uk](http://www.participatorybudgeting.org.uk)

*If you have given us your contact details and want to be kept in touch with the Participatory Budgeting Project please tick this box [ ] . Information won't be shared elsewhere but will be entered on our electronic database.

Now please turn over to complete the questions overleaf (your prize will not depend on completing these other questions)
PARTICIPATORY BUDGETING

Budget Quiz B

1. Why do you think residents should be interested in the City Council’s budget in Yourtown?

2. Roughly how big do you think the City Council’s budget is this year (2004-5)?

3. What percentage of Yourtown City Council’s budget do you think comes from:
   a) Business rates?
   b) Council Tax?
   c) A grant from central government?

4. How much do you think it costs to provide the following services:
   a) A primary school place for one child (each year)
   b) Emptying the bins for one household (each year)
   c) Visiting the library (per visit)

5. What percentage of the Council budget do you think is spent on:
   a) Education?
   b) Social Services?
   c) Police?
   d) Health?
Appendix N:

PARTICIPATORY BUDGETING

Anytown Role Play

Each player joins one of four electoral wards in Anytown. Players are given a character/role to play. There is a facilitator to help and ensure you keep to time.

Step 1: Local Consultations (March/April)

**Individual task:** (you have 10 minutes to do this task)
- Introduce your character, and read through the local quality of life statistics with the other people in your ward.
- Think of a new project that your character would like to see in their area. This could be something that meets your needs, or needs of others in your group (e.g. childcare, IT training, sports, etc)
- Write the project idea, the theme it most closely relates to and the name of your ward on your character card.
- Share your project ideas with the other people in your ward.

**Group task:** (you have about 15 mins to do this task)
- Choose as a group the five themes (investment priorities) for your area and put them in order (5 is the highest priority, then 4 and so on down to 1.) How you choose is up to the group to decide.
- Complete the score sheet for your ward. (Leave the lowest priorities un-scored.)
- Agree two projects to go forward from your area into the next round. You can select one individuals project, combine projects or agree two new projects.
- Agree which theme each project be submitted under. (e.g. CCTV cameras are a crime and community safety project.)
- Select a budget council delegate from your group to join the budget council and present your project ideas on behalf of your ward.

You have a maximum of 30 minutes to complete these tasks.

You are asked to return to the main seminar room as soon as you have completed your group task.

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PB Game – Facilitator Notes
Allow 30 mins to complete the workshop.
By using ‘rules’ sheets distributed to each of 4 ‘wards’ briefly explain workshop first. Explain your role in the game is an ‘engagement worker’ employed by the local authority, not a resident.

1. Give out characters and read out neighbourhood information. Give participants option of changing character if necessary.

2. Ask participants to think of a project idea based on both
   a. info about area and
   b. what their character would like to see in the area. Explain that projects must benefit the area and at least one of the 9 themes.

3. (Meanwhile) Ask participants to choose top 5 priorities together – prompt group to reach a decision, but don’t suggest a method unless group is stuck..

4. Write the ward’s priorities into table on step 1 sheet

5. Ask group to nominate budget council representative to check that priorities have been inputted correctly into the table and to report results back to group.
   (try to get this done in the first 15 minutes)

6. Ask each group to read and explain their project ideas to one another

7. Ask each group to select two project ideas for submission to next round. Explain that group is allowed to combine parts of similar projects or come up with a new collective project idea which will meet needs identified. The group must be able to justify why they chose project and how it will benefit community.

8. Ask budget council representative from each group to present the 2 project ideas, explaining how they chose priorities and why they selected these project. If no-one else wants to you can feed back on behalf of group.
<table>
<thead>
<tr>
<th>My Character</th>
<th>My Character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local midwife, black female churchgoer, mid 50’s</td>
<td>Pensioner, single, owner occupier, with Parkinson’s disease.</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
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<tr>
<td><strong>Chosen Theme:</strong></td>
<td><strong>Chosen Theme:</strong></td>
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<tr>
<td><strong>My local area is</strong></td>
<td><strong>My local area is</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>My Character</th>
<th>My Character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangladeshi women, home worker, 3 children at local primary school</td>
<td>Teenage girl, living with foster family with a history of self harm</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
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<td><strong>Chosen Theme:</strong></td>
<td><strong>Chosen Theme:</strong></td>
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<tr>
<td><strong>My local area is</strong></td>
<td><strong>My local area is</strong></td>
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<td></td>
</tr>
</tbody>
</table>
My Character
Disabled ex-serviceman in late thirties. Renting private flat.

My Proposal is:

Chosen Theme:

My local area is


My Character
Single, mid twenties, female, working in the police force.

My Proposal is:

Chosen Theme:

My local area is


My Character
Gay man, University lecturer, recently abused in the street by local kids.

My Proposal is:

Chosen Theme:

My local area is


My Character
Working single mother, with three teenage children, writes poetry.

My Proposal is:

Chosen Theme:

My local area is
<table>
<thead>
<tr>
<th>My Character</th>
<th>My Character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young married couple, first home, one child with mild autism</td>
<td>Environmental campaigner, mid thirties, with an alcohol problem</td>
</tr>
<tr>
<td>Our Proposal is:</td>
<td>My Proposal is:</td>
</tr>
<tr>
<td>**************************************************************************</td>
<td>**************************************************************************</td>
</tr>
<tr>
<td>Chosen Theme:</td>
<td>Chosen Theme:</td>
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<td>**************************************************************************</td>
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<tr>
<td>My local area is</td>
<td>My local area is</td>
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<td>**************************************************************************</td>
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</tr>
<tr>
<td>My Character</td>
<td>My Character</td>
</tr>
<tr>
<td>Nigerian man, no family, in further education, seeking UK citizenship</td>
<td>Chair of the local Civic Society, retired, some mobility problems</td>
</tr>
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<td>My Proposal is:</td>
<td>My Proposal is:</td>
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<td>Chosen Theme:</td>
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<td>My local area is</td>
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<tr>
<td>My Character</td>
<td>My Character</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------</td>
</tr>
<tr>
<td>18 year white male, trainee car exhaust fitter. Football fanatic</td>
<td>Social worker, female, recovering from work related depression</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
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<tr>
<td></td>
<td></td>
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<tr>
<td><strong>Chosen Theme:</strong></td>
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<tr>
<td><strong>My local area is</strong></td>
<td><strong>My local area is</strong></td>
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<td></td>
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</tr>
<tr>
<td>My Character</td>
<td>My Character</td>
</tr>
<tr>
<td>Member of local youth forum, female, interested in music and acting</td>
<td>Divorced man, council tenant, approaching retirement, no kids.</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
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<td><strong>Chosen Theme:</strong></td>
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<tr>
<td><strong>My local area is</strong></td>
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<tr>
<td>My Character</td>
<td>My Character</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Minicab driver, successful asylum seeker. Paying to learn English.</td>
<td>Bank clerk, single male, mid thirties, living at home with his mother</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
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<td><strong>Chosen Theme:</strong></td>
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<td><strong>My local area is</strong></td>
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</tr>
<tr>
<td>35 year old male, ex-offender, divorced, living in a bail hostel</td>
<td>Young female, prostitute, one child, conviction for possession of heroin</td>
</tr>
<tr>
<td><strong>My Proposal is:</strong></td>
<td><strong>My Proposal is:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Chosen Theme:</strong></td>
<td><strong>Chosen Theme:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>My local area is</strong></td>
<td><strong>My local area is</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 1: Local Consultations (March/April)

**Highton Background and Priorities**

Highton is on the edge of Anytown. It is predominantly council housing and most residents have not bought their homes. There is a major stock transfer to a housing trust planned. A rail station is one of the only good things about living in the area, but it is poorly lit and signposted. Drug use is common. Crime is a problem as is low youth employment and a high teenage pregnancy rate. Heavy industry and pollution blights the area.

**Population:**
The resident population of Highton was 13,100 people, 3 per cent of the population of Anytown.

24% of Highton's population are aged under 16, higher than the average of the rest of anytown

**Employee Jobs and housing:**
There are 25,000 employee jobs being offered in Highton, 12 per cent of the Anytown total. This means that around twice as many people come to work than actually live in the area. Most of those jobs are in the motor and chemical industries.

**Income Support:**
In August 1998 there were 2,400 Income Support claimants in Highton. This represents 23% of the working population.

**Indices of Deprivation:**
The Indices of Deprivation (with rank 1 being the most deprived ward) gave Highton the rank of 133 out of a total of 8414 wards. This makes it significantly deprived in relation to other areas. It qualifies for special regeneration money.

**Crime**
There were around 5 crimes per 1000 households every month in the area, above the average of elsewhere in Anytown

---

**Step 1: Group task:**
- Select the five highest priorities for your area from the listed themes.
- There are 9 themes to consider. Some themes will not get any score.
- Give the top five priorities a score between 5 and 1. (5 = Highest priority)

<table>
<thead>
<tr>
<th>Themes</th>
<th>Crime and CS</th>
<th>Social care</th>
<th>Children and families</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth employment</th>
<th>Physical environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highton</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 1: Local Consultations (March/April)

Middlewood Background and Priorities

Middlewood is a suburb of Anytown, with very poor transport links. Many of its properties were once council run but are now privately owned. Most remaining council tenants are now older people. There is a run down shopping area. The local library recently closed. A retail park and bypass is being built nearby. Crime is a problem, much coming from neighbouring areas such as Hightown.

Population
The resident population of Middlewood is 5,000 people, 1% of the population of Anytown.
There are relatively large numbers of older people in the area, and below average numbers of young people.

Jobs
There were 3,000 people in paid employment in Middlewood, 1.5% of the Anytown total.

Income Support:
15 per cent of the resident population aged 16 or over are on income support. For Anytown 9% are on income support.

Indices of Deprivation:
Indices of Deprivation (with rank 1 being the most deprived) gave Middlewood the rank of 1200 out of a total of 8414. This places it in the bottom 20% of wards nationally.

Crime
There were 5 crimes per 1000 households recorded every month in Middlewood, higher than the city average.

Step 1: Group task:
- Select the five highest priorities for your area from the listed themes.
- There are 9 themes to consider. Some themes will not get any score.
- Give the top five priorities a score between 5 and 1. (5 = Highest priority)

<table>
<thead>
<tr>
<th>Themes</th>
<th>Crime and CS</th>
<th>Social care</th>
<th>Children and families</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth employment</th>
<th>Physical environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIDDLEWOOD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Step 1: Local Consultations (March/April)

Easton Background and Priorities

Easton is an inner city area with a high number of private rented properties and a growing immigrant population. Educational achievement standards are low, but a new adult education college and community centre is being built. There are few parks and green spaces and a lot of traffic congestion causing health problems. A recent crime prevention initiative has cut crime rates to below the average for Anytown.

Population
The resident population of Easton is 11,600 people, 3% of the population of Anytown.
A higher proportion of young people live in Easton in relation to the rest of Anytown

Jobs
There were 2400 employed people in Easton, 1 per cent of the Anytown total.

Income Support
20% of the resident population aged 16 or over is on income support. The Anytown average is 9% of residents on income support.

Indices of Deprivation:
The Indices of Deprivation (with rank 1 being the most deprived ward) gave Easton the rank of 1043 out of a total of 8414. Very close to the bottom 10% of wards, so it is a deprived ward, but just misses on a special regeneration status.

Crime
There are 2 crimes per thousand households every month. This is lower than previously, due to recent police activity in the area.

Step 1: Group task:
- Select the five highest priorities for your area from the listed themes.
- There are 9 themes to consider. Some themes will not get any score.
- Give the top five priorities a score between 5 and 1. (5 = Highest priority)

<table>
<thead>
<tr>
<th>Themes</th>
<th>Crime and CS</th>
<th>Social care</th>
<th>Children and families</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth employment</th>
<th>Physical environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTON</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Step 1: Local Consultations (March/April)**

**Low Hill Background and Priorities**

Low Hill is close to the city centre. It houses the city's hospital and part of the retail shopping centre, as well as high density new housing, many privately owned flats built in the last 5 years. It is predominately white, with a growing middle class population, mainly single households. New trendy cafes line the old canalside. There is a long established gay pride festival held every August.

**Population**
The resident population of Low Hill was 14,200 people, 4% of the population of Anytown. The age range statistics are the same as the national average, with slightly more people aged 20-40.

**Jobs:**
There were 24,000 employed people in Low Hill, 12 per cent of the Anytown total. Many work in service industries.

**Income Support:**
In August 1998 there were 1,175 Income Support claimants in Low Hill. This represents 10% of the resident population aged 16 or over. For Anytown the proportion was 9% compared with an average of 8% nationally.

**Indices of Deprivation:**
The Indices of Deprivation (with rank 1 being the most deprived) gave Low Hill the rank of 4100 out of a total of 8414. This places it in the middle 50% of wards nationally.

**Crime**
There were approximately 2 crimes per 1000 households recorded every month in the area.

---

**Step 1: Group task:**
- Select the five highest priorities for your area from the listed themes.
- There are 9 themes to consider. Some themes will not get any score.
- Give the top five priorities a score between 5 and 1. (5 = Highest priority)

<table>
<thead>
<tr>
<th>Themes</th>
<th>Crime and CS</th>
<th>Social care</th>
<th>Children and families</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth employment</th>
<th>Physical environment</th>
</tr>
</thead>
</table>

LOW HILL

---

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www.participatorybudgeting.org.uk Email: mail@participatorybudgeting.org.uk
Step 2: May/June – The Budget Council calculates Citywide priorities

a) Calculating Citywide priorities

<table>
<thead>
<tr>
<th>Themes</th>
<th>Areas</th>
<th>Crime and CS</th>
<th>Social care</th>
<th>Children and families</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth employment</th>
<th>Physical environment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Highaton</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Easton</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Middlewood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Low Hill</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Score for all other wards ** *(subtotal x 10)*

Total for the City *(Sum of above)*

Notes:
We have been considering the priorities of four wards. These are in the first four rows above

**There are 44 wards in total in Anytown. We don’t have scores for 40 other wards, but the purpose of this experiment we can make these others up. We multiply the priorities we have by 10 and add them into the table

So we calculate the citywide priority by adding the totals together. We could use this to agree spend against each theme

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Appendix O:

PARTICIPATORY BUDGETING

Developing a Budget Matrix

1. Budget Matrix
One important tool often used in PB is the creation of the Budget Matrix. This can be applied to PB for different geographical areas or neighbourhoods within a city or local authority. Budget Matrix can also apply to mainstream budgets across an entire local authority. It compares priorities, against levels of deprivation between different parts of a city or local authority area.

What is a Budget Matrix?
A budget matrix is a table of information that converts locally agreed priorities and ideas into financial allocations. It is a way of allocating money, following discussions that establish local needs and priorities.

The final Budget Matrix is produced after a series of tables are drawn up. The production of the Budget Matrix is a simplified version of the formulas central government uses to calculate the Revenue Support Grant, which is awarded to local authorities over a 3 year settlement period. The tables can by used either to allocate funds across a local authority area or they can be used to allocate money within neighbourhoods.

The point of the tables is to relate three interconnected issues that form the basis of investment decisions under a participatory budget process.

- The actual concerns of residents
- The relative levels of deprivation between areas
- The relative population of each area.

Stage 1 – Establishing local priorities
A table is constructed with geographic areas under consideration on the vertical axis and the different areas of work across the horizontal. Within each area, following consultation with residents, scores are given to the top thematic areas of work, on a scale of 1-4. This table can be used on its own to agree spend against each theme.

Table for local priorities

<table>
<thead>
<tr>
<th>Theme Areas</th>
<th>Crime</th>
<th>Social Care</th>
<th>Children Families</th>
<th>Transport</th>
<th>Education</th>
<th>housing</th>
<th>Leisure</th>
<th>Youth</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. place</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. place</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. place</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. place</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. place</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others Others</td>
<td>20</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>16</td>
<td>14</td>
<td>12</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Totals across the city</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Stage 2 – Developing city-wide priorities
On a city-wide level these priority scores can be added together to provide the city-wide index of priority – crime and safety and the environment tend to come near the top.
Table for city-wide priorities

<table>
<thead>
<tr>
<th></th>
<th>Crime</th>
<th>Social care</th>
<th>Children</th>
<th>Transport</th>
<th>Education</th>
<th>Housing</th>
<th>Leisure</th>
<th>Youth</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>City totals</td>
<td>36</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>24</td>
<td>28</td>
<td>12</td>
<td>17</td>
<td>20</td>
</tr>
</tbody>
</table>

Stage 3 – Adjustments for differences between the local neighbourhood and local authority wide priority

A particular area’s own table of priorities is balanced against the local authority-wide-wide priority for a specific theme. This helps to even out major differences, reduces distortions due to particular circumstances and ensures each area receives some allocation of the available funding. This is a sort of pooling of local and authority-wide knowledge.

Table Adjustments for variance between local and city-wide priorities and themes

<table>
<thead>
<tr>
<th>Area</th>
<th>City-wide priority for crime (Weight)</th>
<th>Local priority for crime (Score)</th>
<th>Multiplied total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aplace</td>
<td>4</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>Bplace</td>
<td>4</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>Cplace</td>
<td>4</td>
<td>4</td>
<td>16</td>
</tr>
</tbody>
</table>

Stage 4 – Adjustments for differences between areas

Each area also receives a scoring in points, depending on its population, and agreed measures of need (deprivation). For crime and safety, the measure of deprivation in this example is the number of reported crimes.

Population, allocation of points

<table>
<thead>
<tr>
<th>Population range</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5,000 residents</td>
<td>1 point</td>
</tr>
<tr>
<td>5,000 - 10,000</td>
<td>2 points</td>
</tr>
<tr>
<td>10,000 - 20,000</td>
<td>3 points</td>
</tr>
<tr>
<td>Above 20,000</td>
<td>4 points</td>
</tr>
</tbody>
</table>

Crimes per thousand households

<table>
<thead>
<tr>
<th>Number of crimes</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 crime</td>
<td>1 point</td>
</tr>
<tr>
<td>2 crimes</td>
<td>2 points</td>
</tr>
<tr>
<td>3 crimes</td>
<td>3 points</td>
</tr>
<tr>
<td>4 crimes</td>
<td>4 points</td>
</tr>
<tr>
<td>5 crimes</td>
<td>5 points</td>
</tr>
</tbody>
</table>

Existing statistics for each area provides a local score, to which a pre-agreed “weighting” is then applied.

Stage 5 – Calculating final resource allocation and producing the final project matrix
Finally the various multiplied totals for each area are added together to generate the final allocation for a particular budget/priority for example crime and community safety.

<table>
<thead>
<tr>
<th>Area</th>
<th>Area based priority</th>
<th>Deprivation total</th>
<th>Population total</th>
<th>Area Score Total of previous columns</th>
<th>Area score as a% of total city score</th>
</tr>
</thead>
<tbody>
<tr>
<td>A place</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B place</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C place</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D place</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>others</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total for all areas of the city</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

Following the completion of the allocation table the department or agency responsible for preventing crime and delivering community safety can then prepare a strategy and allocate resources according to the area score.
THE PARTICIPATORY BUDGETING PROCESS WORK?

1. Local people vote on their priorities, e.g. crime, environment, etc.
2. Local 'NAP' Partnerships consider feasibility and draw up bids
3. Providers (can include community members) present bids to deliver services within the themed headings
4. Local people vote on proposals presented
5. Projects commissioned within themed areas on the basis of votes cast
6. Local people provide a 'Scrutiny Panel' to monitor project progress

<table>
<thead>
<tr>
<th>THEME</th>
<th>SPEND</th>
<th>% SPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safer Comms</td>
<td>£X,000</td>
<td>xx%</td>
</tr>
<tr>
<td>Children and Young People</td>
<td>£Y,000</td>
<td>yy%</td>
</tr>
<tr>
<td>Environment</td>
<td>£Z,000</td>
<td>zz%</td>
</tr>
<tr>
<td>Health</td>
<td>£A,000 (from NAP Pot)</td>
<td>aa%</td>
</tr>
<tr>
<td>Education</td>
<td>£B,000 (from NAP Pot)</td>
<td>bb%</td>
</tr>
<tr>
<td>Housing</td>
<td>£C,000 (from NAP Pot)</td>
<td>cc%</td>
</tr>
<tr>
<td>Economy</td>
<td>£D,000 (from NAP Pot)</td>
<td>dd%</td>
</tr>
<tr>
<td>NAP Reserve</td>
<td>etc.</td>
<td>etc.</td>
</tr>
<tr>
<td>Other matched funding</td>
<td>etc.</td>
<td>etc.</td>
</tr>
</tbody>
</table>

Funds can be taken from here to adjust percentages in line with neighbourhood priorities.

Flowchart

Appendix P: PARTICIPATORY BUDGETING

PB Tool Kit
Notes:
Voice Your Choice checklist – cross a box if any of these things happen today!

For a free Voice Your Choice prize, please tell us what you think. Use the empty boxes or the back for other comments.

<table>
<thead>
<tr>
<th>I'm having a good time</th>
<th>I wouldn't do this again</th>
<th>I asked for something in advance and it's here</th>
<th>I'm worried my kids aren't happy</th>
<th>The day is well organised</th>
<th>The time is going quickly</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't like the food</td>
<td>I feel this is good for our neighbourhoods</td>
<td>I'm not happy about voting</td>
<td>The day is badly organised</td>
<td>I think everything is being done fairly</td>
<td>The voting seems quite easy</td>
</tr>
<tr>
<td>I would do this again</td>
<td>Some of the projects won't be good for the area</td>
<td>I fancy getting involved in this sort of thing again</td>
<td>I'm not sure what it's all about</td>
<td>I wouldn't tell other people about Voice Your Choice</td>
<td>I like the venue</td>
</tr>
<tr>
<td>I feel a bit bored</td>
<td>The ideas could be better</td>
<td>All the projects would be good for the area</td>
<td>Everything seems to take ages</td>
<td>I don't like the venue</td>
<td></td>
</tr>
<tr>
<td>I find the voting procedure confusing</td>
<td>I might do this again</td>
<td>I'm inspired by what I'm seeing and hearing</td>
<td>Everyone can take part</td>
<td>My kids are being well looked after</td>
<td></td>
</tr>
<tr>
<td>I might tell other people about Voice Your Choice</td>
<td>The food is great</td>
<td>I'm not having a good time</td>
<td>I don't think the way it's done is fair</td>
<td>I would tell other people about Voice Your Choice</td>
<td></td>
</tr>
<tr>
<td>I feel like I'm having a real say in what will happen where I live</td>
<td>I asked for something in advance and it isn't here</td>
<td>It seems like a waste of time</td>
<td>I think it's a good way of getting people involved in their area</td>
<td>I'm happy to vote</td>
<td></td>
</tr>
</tbody>
</table>

Thanks for telling us what you think of the [insert name of PB event] Voting Event. Would you be willing to let us phone you in the next few weeks to find out more? If so, or if you want to get involved in this sort of thing yourself, please put your name, address and telephone number below.