



2017 Budget Delegate Guide



City of Cambridge
Participatory Budgeting
Budget Delegate Orientation
August 8, 2017

CONTACT INFORMATION

If you have questions about the Budget Delegate process,
please contact us in the Budget Office!

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I. Roles & Responsibilities: Who does what?

BUDGET DELEGATES	COMMITTEE FACILITATORS
<ul style="list-style-type: none">• Work as part of a committee to research submitted ideas. Participate regularly in committee meetings (weekly during August-October).• Discuss and prioritize initial project ideas.• Conduct site visits in Cambridge; visit proposed locations of projects.• Consult with City staff on project feasibility. Learn about the City’s capital budget and the budget process.• Evaluate projects on need, impact, and feasibility.• Help your committee develop a proposal for at least one project.• Review feedback from City staff and the City Manager to make final decisions about projects on the ballot. Tweak project language to make it appealing to voters.• Provide explanations to the Budget Office for each project that did not make it to the ballot as to why it did not move forward.• Communicate Delegate concerns to facilitators and the Budget Office.• Provide feedback to evaluate the PB process.	<ul style="list-style-type: none">• Serve as a neutral party to facilitate committee meetings and ensure that all Budget Delegates are able to participate.• Serve as the main point of contact for the Budget Office, and help coordinate communication within the Delegate committee and between the committee and Budget Office.• Set meeting agendas, with help from the Budget Office and partners.• Connect Delegates with information and resources. Facilitators are not expected to do research themselves or make decisions on projects.• Ensure that notes are taken at each meeting and distributed to the committee. Keep committee members who miss meetings updated on the committee’s progress and what needs to be done.• Ensure the committee meets its deadlines! Remind Delegates of meetings and deadlines by email or telephone.• Participate in facilitator conference calls or meetings, as determined by Budget Office.• Provide feedback to evaluate the PB process.

BUDGET OFFICE

- Help find and book meeting space for committees.
- Provide data on community demographics and amenities (City maps and studies).
- Provide information on the capital budget and other materials to guide facilitators and Budget Delegates.
- Serve as a liaison between Budget Delegates and City departments. Work with departments to obtain feedback on projects, including feasibility and cost estimates.
- Support and advise facilitators and Budget Delegates.
- Help resolve conflicts.

OTHER CITY DEPARTMENTS

- Meet with Budget Delegates to discuss eligibility rules for capital projects, clarify what projects are already in the pipeline, and answer questions about the feasibility of various projects.
- Communicate with Budget Delegates via email or phone to clarify issues or answer additional questions.
- Provide cost estimates in November for a final shortlist of projects for the ballot.

CITY MANAGER

- Vet the final shortlist of proposals for the ballot.



II. Budget Delegate Timeline

MEETING/EVENT	BENCHMARKS & GOALS	DATE
Orientation <i>Citywide Senior Center</i>	<ul style="list-style-type: none"> Learn about the Budget Delegate timeline and proposal development process Choose your committee, meet your teammates, and determine weekly meeting time 	Tues 8/8 6-8pm
Committee Meeting 1	<ul style="list-style-type: none"> Get to know your teammates Discuss eligibility criteria Familiarize yourself with your committee's idea list 	Mon 8/14 6-8pm
Committee Meeting 2	<ul style="list-style-type: none"> Develop project subgroups and assign Delegates for each Start reviewing maps, demographic info, and other resources Assign Delegates to conduct site visits of some projects 	Mon 8/21 6-8pm
Committee Meeting 3	<ul style="list-style-type: none"> Report back from site visits; identify any additional site visits needed Develop questions to ask City staff during the first department speed consulting session on 9/12 	Mon 8/28 or TBD week of 9/5
Department Speed Consulting A <i>City Hall</i>	<ul style="list-style-type: none"> Consult City staff about how the City plans for certain types of projects, what is/isn't City property, and what projects are already in the pipeline 	Tues 9/12 5:30-7pm
Committee Meeting 4	<ul style="list-style-type: none"> Review department feedback Select priority projects for additional research 	Mon 9/18 6-8pm
Committee Meeting 5	<ul style="list-style-type: none"> Review and finalize 20-30 projects to ask City staff about at next speed consulting session on 10/3 Make a list of questions to ask; assign Delegates to ask about specific projects 	Mon 9/25 6-8pm

Department Speed Consulting B <i>City Hall</i>	<ul style="list-style-type: none"> Consult City staff about specific projects Take detailed notes from consultations to discuss during next committee meeting 	Tues 10/3 5:30-7pm
Committee Meeting 6	<ul style="list-style-type: none"> Review department feedback Select shortlist of projects (up to 8 per committee) to send to the Budget Office 	TBD Week of 10/10
Committee Meeting 7	<ul style="list-style-type: none"> Finalize 5-8 proposals to submit to the Budget Office 	Mon 10/16 6-8pm
Proposal Shortlists due <i>via email</i>	<ul style="list-style-type: none"> Each committee submits up to 8 final proposals to the Budget Office for final review and cost estimates by City staff and the City Manager 	Mon 10/23 by 5pm
City staff feedback due	<ul style="list-style-type: none"> City staff provide feedback and cost estimates to Budget Delegates by 5pm 	Thurs 11/9 by 5pm
Delegate Committee Meeting 8	<ul style="list-style-type: none"> Review the City Manager's feedback and cost estimates Identify any necessary proposal adjustments Finalize project proposals and text for the ballot 	Mon 11/13 6-8pm
Final ballot text due <i>via email</i>	<ul style="list-style-type: none"> Delegates submit final proposal text for ballot and website to the Budget Office by 5pm 	Thurs 11/16 by 5pm
Vote Week!	<ul style="list-style-type: none"> Spread the word about the PB vote Optional: volunteer at voting sites 	Sat 12/2 – Fri 12/8
PB Vote Results Party <i>Citywide Senior Center</i>	<ul style="list-style-type: none"> Winning projects are announced! 	Tues 12/12 6-7pm

III. Budget Delegate Committees and Sample Projects

COMMITTEE	SAMPLE PROJECTS
Community Resources	<ul style="list-style-type: none"> • Benches • Economic development • Homelessness and housing • Library resources • Nap pods • Public restrooms • Water fountains/bottle fill stations
Environment	<ul style="list-style-type: none"> • Community gardens • Composting, recycling, and trash • Electric vehicles • Solar panels and sustainable energy • Trees
Parks & Recreation	<ul style="list-style-type: none"> • Athletic facilities/fields and equipment • Dog parks • Park and playground improvements • Performance venues and public art • Universal design play equipment • Water play features
Streetsmarts	<ul style="list-style-type: none"> • Bicycle infrastructure • Bus stop/shelters and transit screens • Parking improvements • Pedestrian walkways/bridges • Street and sidewalk improvements • Traffic calming
Youth & Technology	<ul style="list-style-type: none"> • Charging stations • Cambridge public school equipment/resources • Public wifi/internet access • Youth Center equipment/resources

IV. Project Eligibility: What can be funded?

Each year, the City of Cambridge develops an operating and capital budget for the upcoming fiscal year. The City's fiscal year runs from July 1 - June 30. The operating budget funds programs and services, while the capital budget is used for infrastructure improvements. In fiscal year 2019, the City will allocate **\$800,000 of the capital budget** for participatory budgeting projects.

Projects are eligible for PB funding if they meet the following criteria:

- **Are capital projects**, which usually involve **infrastructure improvements** (as opposed to operating projects, which usually fund salaries and services).
 - Most capital projects have some sort of associated operating cost. Projects that would require the City to hire additional staff are not eligible.
- **Are one-time expenditures** (not multi-year projects) **that cost \$800,000 or less.**
- **Benefit the public.**
- **Are implemented by the City of Cambridge on City property** (streets, sidewalks, parks, libraries, schools, youth centers, senior centers, municipal buildings, etc.)
 - Projects on Cambridge Housing Authority (CHA), MA Department of Conservation and Recreation (DCR), and MBTA property are not eligible.
 - PB funding cannot be used to make a grant to a nonprofit organization.

Project Vetting

By October 23, your committee will submit up to **8 project proposals** to the Budget Office, who will share them with other department staff and the City Manager. Department staff will provide cost estimates and final feedback for these proposals. All proposals must be reviewed by the City Manager to ensure they meet all of the legal requirements for capital funding before being submitted for a public vote.

Each of the five Budget Delegate committees can ultimately recommend 4 projects for the PB ballot, for a total of **20 projects on the ballot**. We ask that you submit more than 4 projects for final vetting, because some projects may hit roadblocks and not receive final approval.

Examples of Eligible and Ineligible Projects

ELIGIBLE	NOT ELIGIBLE
<ul style="list-style-type: none">• Repaving a street or sidewalk• Installing new playground equipment, water fountains, lights, and trees• Renovating a portion of a park or building a new community garden• Purchasing equipment or furniture for a school, library, youth center, or senior center• Creating and installing new public art	<ul style="list-style-type: none">• Hiring more teachers for the Community Learning Center (operating funds)• Starting a new summer camp for kids (operating funds)• Renovating a privately owned building, a church, or a T stations (not City property)• Hiring a counselor to provide mental health services (operating funds) for the homeless• Installing a boat dock on the Charles River (not City property)

What should you do to make sure that your projects work?

- **Look for similar projects.** Consult the City's FY17 and FY18 Capital Budget (provided by the Budget Office - in the Budget Delegate folder online) to see what projects are already included in the City's plan.
- **Remain goal-oriented and be flexible** about how you will meet the public need you identify. Just because a project does not work in one location doesn't mean it shouldn't be tried in others. If a project seems like it requires operating funds (salaries, services), is there a way to change the scope to make it become more capital in nature (purchase of equipment, furniture, renovations)?
- **Consult with City staff** through the Budget Office to get concrete answers as to what qualifies as a capital project and what does not.

What other barriers might there be to making a project work?

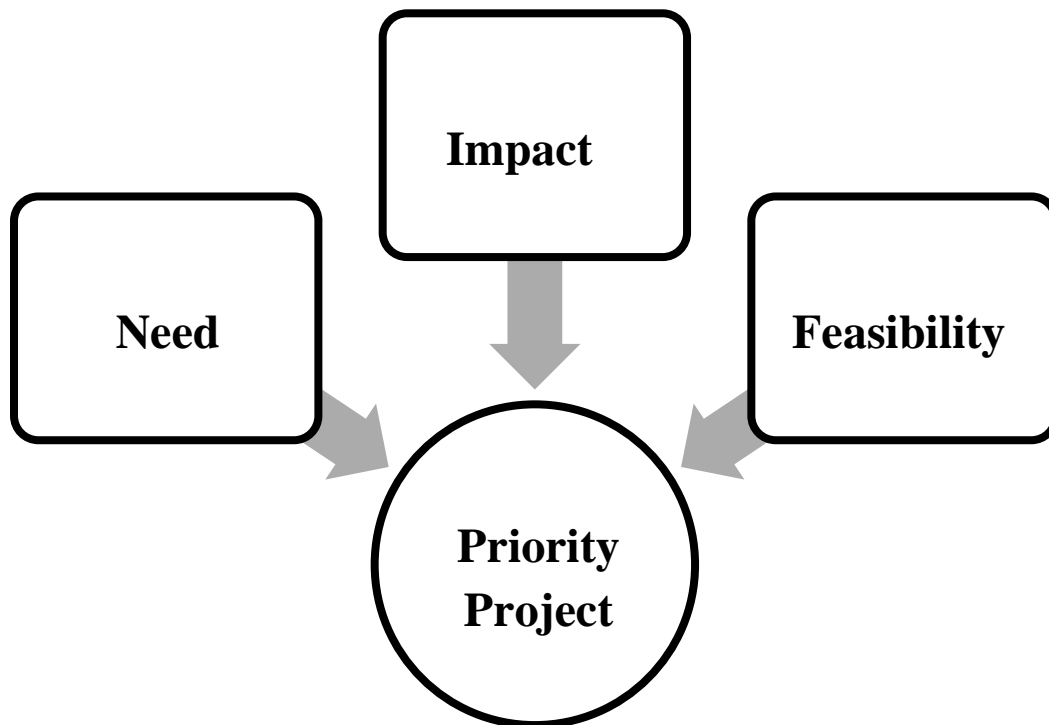
The following issues are worth keeping in mind as you flesh out project proposals:

- The City has engineering, procurement, or quality standards that the project might not meet or might significantly raise costs when applied.
- The City might not have jurisdiction over all of the property involved in a particular project.
- Getting an accurate cost estimate for a unique project might be difficult.
- In some cases in which a capital project significantly impacts the operating budget, the City Manager might require money in the operating budget for maintenance to be arranged before s/he approves a project.

V. Narrowing Down Your Idea List and Developing Proposals

What are the Criteria for Evaluating Ideas?

As representatives of the community, you should keep the community's best interests in mind as you decide which projects to work on and include in the final ballot. The criteria below will help you evaluate and prioritize project ideas:



How do we know if there is a high NEED for this project?

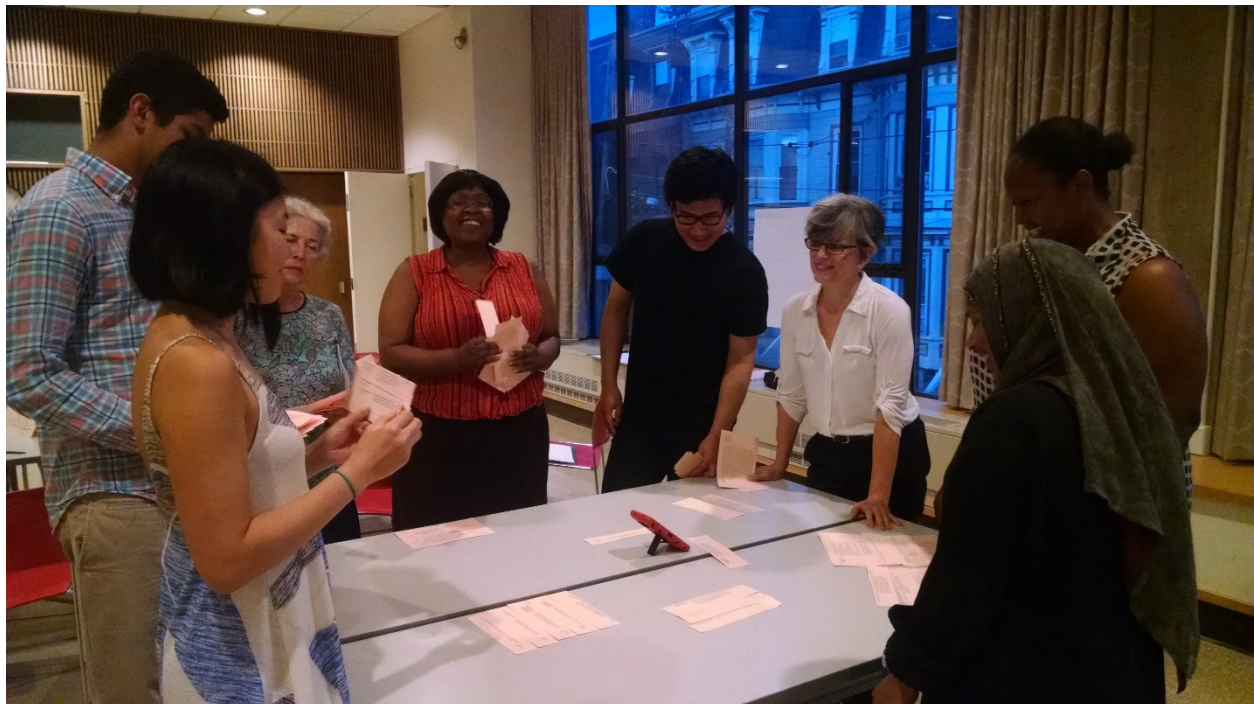
- High level of community need based on household income levels or other demographic data.
- High level of community support for the project, demonstrated by feedback from community members, the number of times the idea was proposed by different people, etc.
- High level of need identified through the committee's research and experience.
- The community lacks access to the type of project in question (community gardens, bike facilities, free public wifi, library technology, public art, etc).

How do we know if a project will have a large **IMPACT** on the community?

- A relatively large number of people would benefit from the project.
- An underserved or underrepresented community will benefit from the project (low-income households, youth, seniors, veterans, immigrants, people with disabilities, etc.).
- The project would benefit people in the community for many years (impact is not short-lived).

How do we know if a project has a high degree of **FEASIBILITY**?

- Similar capital projects have been implemented by the City before. Consult with City staff and look at the City's capital budget documents for previous fiscal years.
- Project appears to meet the eligibility criteria outlined on page 6.
- Project must be a one-time expenditure that can be completed within one year (does not recur over a multi-year timeframe).
- Project could likely be implemented for less than \$800,000. Look at the City's capital budget to see what similar projects have cost.
- Confirm that the project location is owned by the City and not by other entities, such as the MBTA, DCR, a university, the Cambridge Housing Authority, or a private owner.



How to Research Needs and Develop Project Proposals

1. Discuss Community Needs as a Committee

Needs are things and conditions that make it possible for every person to live a dignified, healthy, and peaceful life. Committee members will work together to determine the areas of highest need in the community. The maps and demographic information may come in handy for these discussions.

What can you do in PB to address needs?

- Prioritize those projects that address the deepest and most urgent needs.
- Give underserved and underrepresented people a voice and increase their participation.
- Prioritize those projects that benefit the most underserved communities.

2. Do Field Research

Field research is one of the best ways that Budget Delegates gather the information necessary to research project ideas and evaluate project need and impact. Budget Delegates can visit different neighborhoods to assess needs, meet with local service providers and community groups, conduct site visits of proposed project locations, conduct simple neighborhood polls by talking to residents on the street or emailing out a survey to neighborhood groups, etc.

Tips for site visits:

- **Brainstorm questions beforehand**, either with your committee or individually. Many questions will be project-specific.
- **Capture what you see** using photos and videos. Photos will come in handy when developing final project proposals. You can upload them to your committee folder in Google drive.
- **Speak to locals.** How do they understand community needs? What ideas proposed during idea collection might address their needs? Seek out a variety of opinions to see where there may be conflicts between groups. For example, students and parents may have different views on issues in local schools.
- **Take Notes!** You'll be reporting back to your committee on your field research, and you'll need to refer back to your findings later. It's important that you have a good record of the experience. Keep track of new questions that arise from the research.

3. Consult with City staff

The Budget Office will serve as a liaison to other City departments that are relevant to your project development. Budget staff will help you figure out which other departments you need to speak with and will connect you via email or phone.

You will also have two opportunities to meet in person with representatives from multiple departments during two department “speed consulting” events in September and October. Your committee facilitator and the Budget Office will help organize those consultations as well as any follow up communication with departments.

The most relevant City departments for PB projects include: Arts Council, Commission for Persons with Disabilities, Community Development, Conservation Commission, Electrical, Historical Commission, Human Services, Information Technology, Library, Open Space Committee, Public Works, School Department, Traffic, and Water.

The City’s website has tons of helpful information. The following links may be good places to start:

- **5-Year Street & Sidewalk Reconstruction Plan:**
<http://www.cambridgema.gov/theworks/ourservices/engineering/aboutengineering/fiveyearplandescription>
- **City Budget information:** <http://www.cambridgema.gov/budget>
- **City Construction Projects:**
<http://www.cambridgema.gov/theworks/ourservices/engineering/cityconstructionprojects.aspx>
- **Demographics and Statistics FAQ:**
<http://www.cambridgema.gov/CDD/factsandmaps/demographicfaq>
- **GIS Unit Map Gallery:** <http://www.cambridgema.gov/GIS/mapgallery>
- **Open Space Map Gallery:**
<http://www.cambridgema.gov/CDD/factsandmaps/mapgalleries/openspace.aspx>
- **Neighborhood Map Gallery:**
<http://www.cambridgema.gov/CDD/factsandmaps/mapgalleries/neighborhood.aspx>
- **Transportation Data:**
<http://www.cambridgema.gov/CDD/factsandmaps/transportationdata.aspx>
- **Transportation Map Gallery:**
<http://www.cambridgema.gov/CDD/factsandmaps/mapgalleries/transportation.aspx>

4. Use the Project Evaluation Matrix

The Project Evaluation Matrix is a tool your committee can use to help evaluate project ideas based on the need, impact, and feasibility criteria outlined on pages 8-9. The Matrix uses a numeric scale of 1-4 where **1 indicates the lowest level** of need, impact, or feasibility and **4 indicates the highest level** of need, impact, or feasibility. The projects with the **highest** total score continue to be researched and developed. This process can be used at different points in the proposal development process to help determine which projects will move forward.

Project	A. How much <u>need</u> is there for this project?	B. How much <u>impact</u> would this project have on the community?	C. How <u>feasible</u> is the project?	Total project score
Project 1:				
Project 2:				
Project 3:				
Project 4:				
Project 5:				
Project 6:				

VI. What will your committee produce?

1. Project Proposal Forms: Monday, October 23, 2017 by 5pm

You'll submit the following information in a Word or Google document to the Budget Office for departments to cost out and the City Manager to vet. Each committee will submit up to 8 proposals for vetting (please submit together in one document).

PB PROJECT 1

Committee:

Project Title:

Cost: [City staff will fill this in, but delegates can include estimates the committee prepared as part of its research]

Location:

Short Description:

Long Description:

Photos/images: [optional: 1-4 photos/images inserted into the document. Images can also be emailed to the Budget Office or uploaded to Google drive.]

2. Final Proposal Text: Thursday, November 16, 2017 by 5pm

Once your committee has reviewed cost estimates and feedback from the City Manager and City departments, you must finalize the text and information on the proposal forms and re-submit it to the Budget Office. This is where space and character limits become very important.

PB PROJECT 1

Committee:

Project Title: [50 characters max, including spaces]

Cost: [from City staff]

Location: [as succinct as possible, no more than 6 words]

Short Description: [240 characters max, including spaces – this will be on ballot]

Long Description: [Can be 1-4 paragraphs or longer – this won't fit on ballot but provides an opportunity to explain details of the project]

Photos/images: [optional: 1-4 photos/images inserted into the document. Images can also be emailed to the Budget Office or uploaded to Google drive.]

The project title, cost, location, and short description will all appear on the ballot (see examples from the third PB cycle below). Ballot layout and design are coordinated by the Budget Office. All of the proposal information, including the images, will appear on the City's PB website (pb.cambridgema.gov) and in project binders at voting sites.

Example of final ballot text for two projects from last year:

STREETS & SIDEWALKS



☐ **13. Kinetic Energy Tiles (\$50,000)**

Harvard Square, CRLS

Kinetic energy tiles are tiles that generate energy from your footsteps! We want to introduce these tiles into our city and get Cambridge residents involved with clean energy! These tiles can power streetlights, phones, or laptops.

☐ **14. Solar-Powered Real-Time Bus Tracker Displays (\$150,000)**

High-use bus stops throughout Cambridge

This project proposes installing 10 solar-powered bus tracking displays with real-time arrival information at high-use bus stops throughout the City of Cambridge.

VII. FAQs

1. Will we only be developing proposals for projects that are on this initial list?

Yes! The project lists given to each committee contain all of the ideas submitted by community members in June and July that relate to the committee's focus. Budget Delegates must consider every project on the list.

2. How do we divide up the projects among us or decide who does what?

This is up to each committee to decide. You can each work on separate projects or you can work in subcommittees on groups of projects. Some committees find it helpful to divide projects into subcategories. For example, the Culture & Community Facilities Committee may want to group projects into subcategories such as Public Art Projects, Library Projects, and Senior Projects, etc.

3. How will we know how to determine project costs?

The Budget Office will work with other City departments to answer questions about costs and other concerns. It is up to City staff, not Budget Delegates, to determine the final cost estimate for a proposal.

4. How specific should our proposals be?

Your proposals should specify the exact project and work to be done, its proposed location(s), why it's needed, and who it will benefit. It does not have to be long, but it should outline these elements in clear, concise language. Please see the Project Proposal Form on page 14 for details.

5. How can we be sure that the City isn't simultaneously planning one of the projects we're working on?

Delegates can consult the City's FY17 and FY18 capital budgets, which have been uploaded to [Google drive](#), and can ask City staff about projects they are planning to undertake in the next few years. The Budget Office will also help you determine whether proposed projects are already being planned for future capital budgets.

6. What is the best way to communicate within our committee outside of meetings?

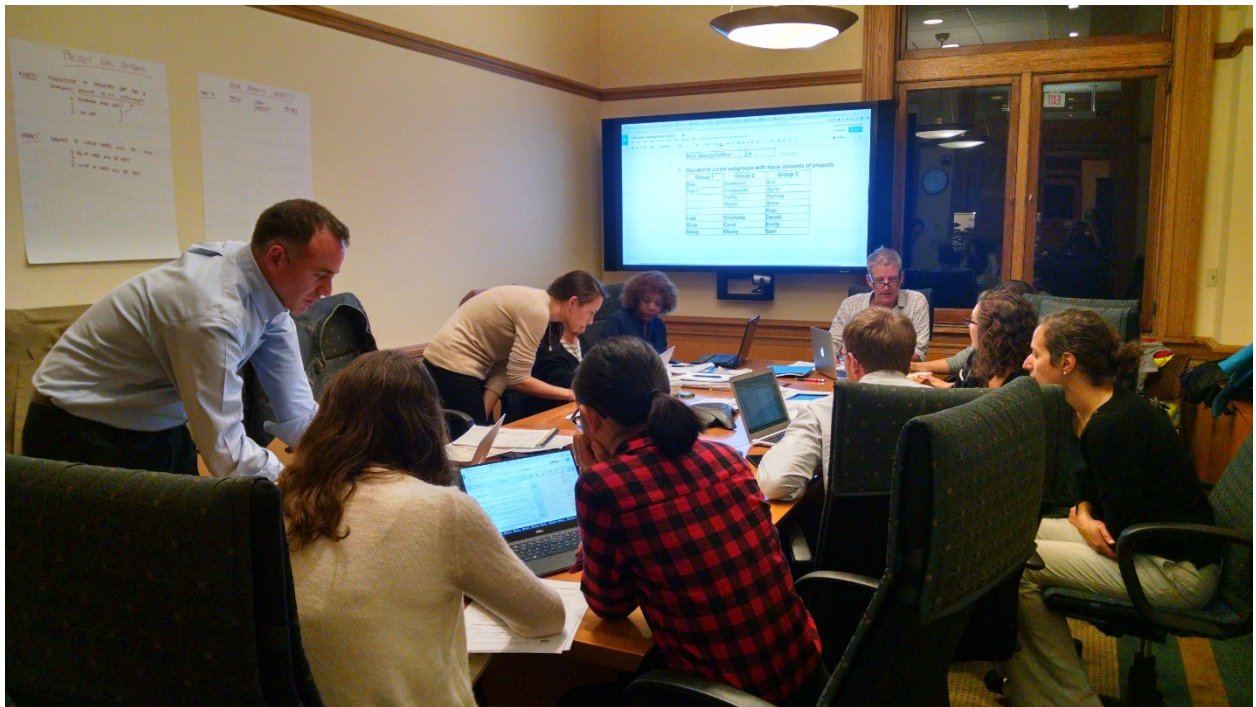
Each committee is free to decide what works best in terms of communication, as long as your communication method is as inclusive as possible. Most committees choose to communicate via email. Sometimes group members who can't attend a particular meeting in person end up calling in for part of the meeting by phone.

7. Can we work with other committees?

Committees are encouraged to work together to assess community needs and research projects that affect other committee's areas of interest. For example, a neighborhood's environmental and transportation needs may be connected. Committees may want to meet together to identify needs, share ideas, or discuss lessons learned and challenges. You can work with your facilitator and the Budget Office to plan meetings or other exchanges between committees.

8. Can we campaign for our projects?

Yes, you can encourage voters to vote for your projects, but you must remain respectful of the other committees and of the PB Cambridge process when campaigning. You can campaign *for* your projects, but not *against* other projects on the ballot.



VIII. Advice from Budget Delegates in Other PB Processes

- Use your interactions with the City departments strategically. Work with the Budget Office to make sure you make the most of the limited interactions.
- Get specific early on in the process about what exactly you hope to do and what questions you need answered.
- Frequent communication between the Delegates is a must. You also may want to set internal committee deadlines or check points to help move things along. Google groups can be an effective way to send updates and share information. The Budget Office will establish a Google group for each committee.
- Stay in touch with the other committees. You may want to partner on some projects. Other committees can help work through challenges or offer useful advice.
- One key factor in capital eligibility is who owns the land or property. Figure this out early, since it might not always be obvious!
- You may want to consider bundling projects for voting purposes.
- Many potential capital projects imply an operating expense (additional staff/salaries, cleaning and maintenance costs, etc). The City Manager may not approve a project if there isn't a clear way to pay for the operating expenses or if they are too significant.
- Meet with relevant organizations and stakeholders. You may gain ideas to improve a proposal, learn about needs, get a better sense of the support for an idea, or identify barriers. Take notes and report back to the committee.
- In determining which projects should go on the ballot, think about whom in the community is likely to support it. Consider how to maximize its appeal through language (catchy project title and compelling short description).

Thank you for making Participatory Budgeting
possible in *Cambridge*!