



PROJECT EVALUATION MATRIX

Overview

The Project Evaluation Matrix is a tool used by Budget Delegates to evaluate project ideas based on three main criteria: **impact, equity, and feasibility**.

This tool advances equitable public spending through a collaborative process where delegates direct resources to the greatest need.

How to Use this Tool

This tool helps you score project ideas on a scale of 1 to 3 in terms of impact, equity, and feasibility (where 3 is the highest). This tool will be used at the beginning of the process to evaluate projects and at the end to determine which projects go on the ballot. It can also be used anytime you need to think through your priorities and options for research, as an individual or with your team. In addition to this, Budget Delegates will use a Project Proposal Form to document their research and collect information necessary to develop a complete budget proposal.

STEP 1: Make a list of projects to research and conduct assessment

At the first committee meeting, Budget Delegates will use the tool to decide which projects they will research and to identify questions that require answers before determining project ratings.

STEP 2: Decide which projects will be submitted for feedback

Budget Delegates will use information gathered from data, site visits, and agency briefings while ranking ideas to determine which projects will be submitted for feedback during the technical review.

STEP 3: Incorporate feedback and select final projects for the ballot.

Incorporating technical review feedback may alter ratings for feasibility or need.

Evaluating Projects: Feasibility

How do we know if a project is highly feasible?

- Similar projects have been implemented by the local government and its partner agencies.
- The project meets eligibility criteria for PB funding.
- The project cost is above \$50,000 or below \$800,000 based on the elements identified during community research and validation of cost with government and stakeholders.
 - The related government department has stated that the project is feasible.
 - There are little or no legal barriers to implement the project.
 - The public agency or community organization that is participating has stated it is feasible and provided an agreement with local government.

Rating:

3. Project is highly likely to be feasible
2. Project may or may not be feasible
1. Project is not feasible

Sample Research Questions:

- What similar programs or facilities exist? Who has access to them?
- Are there plans in the near future for a similar project? When is the timeframe? How certain is it to take place?
 - Can government staff advise of a similar program? Are there existing procedures for such a project to be implemented?
 - How long would the approval process take place? Can it be completed during the time allotted for proposal development in this cycle?
 - Who currently owns the property and/or program? Who operates it? Is it the same entity?
 - What laws or regulations exist regarding this process or program?
 - What kind of ongoing costs are associated with this project?
 - What are the resources necessary to implement the process? Is the total amount of monetary resources needed to implement above \$50,000 and less than \$800,000? Has the cost been verified to include any regulatory or sourcing regulations which the project is subject to? Have stakeholders who are experienced in this project helped to review and verify the cost?

Evaluating Projects: Impact

How do we know if a project will have a high degree of impact on the community?

- A large number of people would directly benefit from the project
- This project is not already being funded by government or another source.
- The project would bring additional resources into the ward, such as matching funds or in-kind support

Rating:

- 3: High impact – project benefits marginalized communities navigating very limited access to resources or a large number of people will benefit
- 2: Medium impact – project benefits marginalized communities or a medium number of people will benefit
- 1: Low impact – project does not benefit marginalized communities or a small size population benefits

Sample Research Questions:

- Who has access to this project? What is demographic makeup of the area directly adjacent to the proposed location? What are the specific communities we are referring to?
- What kind of transportation is necessary to get there? Is that transportation available and accessible?
- How is the location physically accessed? Can someone who uses a wheelchair or other mobility aid participate?
- What is our direct experience or that of residents?
- Do similar programs, services, or facilities exist? If so, who provides and who receives or makes use of them?

Evaluating Projects: Equity

How do we know if a project advances equity?

- Your committee's own research, meetings with city staff, and observations will determine if a project advances equity through solving an important community problem.
- The number of times a project was proposed during idea collection may indicate the strength of community support.
- The project removes a barrier to accessing an existing resource.
- The project addresses the impact and harm caused by systems of power.
- The project provides a resource to a part of the community which did not previously have access to this resource
- The neighborhood surrounding the project has been shaped by structural inequities, including lower social or economic status, adverse health outcomes, or other measures of limited resources
- The project would center communities who have been historically marginalized (e.g. low-income communities, public housing residents, immigrants, people experiencing homelessness, LGBTQ communities, children in foster care, people with disabilities, people of color, formerly incarcerated individuals, etc.).

Rating:

3. High contribution to advancing equity
2. Moderate contribution to advancing equity
1. Low contribution to advancing equity

Sample Research Questions:

- What communities that have a history of inequity due to systems of power? What indicators will we use to determine this?
- What is our direct experience or that of residents?
- What are the specific people, groups, and locations we are referring to?
- What data do we have available? *For example: Statistics show inequities across health outcomes; statistics show high unemployment rate; statistics show low median income; area has mostly public housing; area lacks open space; area has environmental hazards*
- What are the most urgent and deepest needs? What types of urgent needs will our committee's projects need to address? *For example: lack of access to jobs; healthy food; safe & healthy housing and a safe living environment; lack of access to facilities and environments that help keep us healthy (e.g. open space, exercise, health centers, healthy environment); lack of access to spaces for meeting and assembling with other people; lack of physical safety*

Evaluating Projects: Assigning a Score

How does this solve a community need?

Committee:	A. How much of an impact will this have? (1 = low; 3 = high)	B. How equitable is this project? And for whom? (1 = low; 3 = high)	C. How feasible is this project? (1 = low; 3 = high)	Total project score (?/9)
Project 1: Location: Ward:				
<i>Questions to research:</i>				
Project 2: Location: Ward:				
<i>Questions to research:</i>				
Project 3: Location: Ward:				
<i>Questions to research:</i>				
Project 4: Location: Ward:				
<i>Questions to research:</i>				

