



# **RULEBOOK**

*Office of Participatory Budgeting*  
2024-2025

**CITY of BOSTON**

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# EXECUTIVE SUMMARY

Participatory Budgeting (PB) is a democratic process where community members directly decide how to spend part of a public budget. Participatory Budgeting is a practice that deepens democracy, builds stronger communities, and creates a more equitable distribution of public resources.

The City of Boston’s Office of Participatory Budgeting (OPB) was established to provide an official point of entry for Boston residents to contribute to the City’s budget process. The Office works to empower constituents and elevate community centered project ideas with an emphasis on advancing social and racial equity. Through yearly PB cycles, residents will be able to propose creative new ideas to address local needs as well as to help inform priorities for the City’s annual budget process.

For this pilot year, OPB and its External Oversight Board (“the Board”) have created a “Participatory Budgeting Rulebook” to provide a set of rules and operations for Participatory Budgeting in Boston. A description of phases and timeline is summarized below:



**RULEBOOK  
DEVELOPMENT  
& PLANNING FOR  
IMPLEMENTATION**  
*(Jan. - Jun. 2024)*

The Office of Participatory Budgeting and its External Oversight Board, in meetings open to the public, determine the parameters and procedures that will guide the implementation of Participatory Budgeting in Boston.



**IDEA  
COLLECTION  
CAMPAIGN**  
*(Jul. 2024)*

Residents share project ideas with the Office of Participatory Budgeting to be considered for funding. Ideas can be submitted through an online PB Portal, a PB phone line, in-person at Public Library branches and at City Hall, and at events hosted with Community Partners across the city.



**REVIEW OF  
COMMUNITY  
PRIORITIES**  
*(Aug. - Sep. 2024)*

OPB reviews all the project ideas shared by residents to determine eligibility. Then working closely with the Board in meetings open to the public, OPB will identify the top 15 Community Priorities based on the number of similar ideas submitted.



**VISIONING FORUMS & ONLINE ENGAGEMENT**  
(Oct. - Nov. 2024)

At Visioning Forums, residents will engage with OPB and relevant City Departments to review, discuss, and assess the feasibility and impact of all ideas under each of the 15 Community Priorities. Through this process, Visioning Forum attendees will draft a statement to define what ballot proposals should look like for each Community Priority. For residents who cannot attend these Forums, an online option will be available to provide feedback.



**PROPOSAL DEVELOPMENT**  
(Dec. 2024)

A PB ballot with the 15 proposal statements drafted by residents will be finalized by OPB and the Board by reviewing and incorporating relevant online feedback. OPB and City Departments will conduct a final feasibility assessment and determine estimated costs for each ballot proposal.



**VOTE**  
(Jan. 2025)

Residents will vote for five (5) out of the 15 ballot proposals. Voting will occur online and in-person at City Hall and Public Library branches. Ballot proposals with the most votes will be awarded up to the funding cap for the particular PB Cycle.



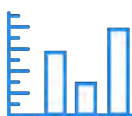
**FUND PROJECTS**  
(Feb. - Apr. 2025)

OPB will work with City Departments to determine the most appropriate avenue to implement winning proposals. Implementation can happen via City Departments doing the work, or by offering contracts or grants to Community Organizations.



**IMPLEMENTATION MONITORING**  
(May 2025)

The Office will track and report on the progress of PB funded projects on its website and annual reports.



**EVALUATION**  
(Jul. - Apr. 2025)

OPB and the Board will assess the outcomes of the pilot year, monitor and track the implementation progress of PB-funded projects to ensure accountability and successful results.

# 1. PARTICIPATORY BUDGETING

## ABOUT THIS RULEBOOK

The purpose of this Rulebook is to outline the policies and procedures of Participatory Budgeting (PB) in Boston, including measures that align with the City's goals of achieving and embedding equity and inclusion into its practices, and building collective capacity on issues of racial and social justice. This Rulebook serves as a standalone document meant to provide a framework and standard set of rules and operations for PB in Boston. Any supplemental materials produced, including but not limited to [OPB's website](#) and outreach and engagement materials, follow the guidelines of this document. Some programmatic details not included in the Rulebook, such as agendas and format of community meetings, will be developed during the Planning for Implementation Phase.

Between January and March of 2024, the Office of Participatory Budgeting (OPB) and its External Oversight Board worked collectively to create this Rulebook in meetings open to the public. The content and overall framework described in this document was developed by researching best practices on Participatory Budgeting and incorporating comments and feedback from the Board and the public. OPB will annually review, amend, and update the Rulebook as needed, in consultation and with the majority approval of the Board.

## WHAT IS PARTICIPATORY BUDGETING?

Participatory Budgeting (PB) is a democratic process where community members directly decide how to spend part of a public budget. Participatory Budgeting started in 1989 as an anti-poverty measure in Porto Alegre, Brazil. Since then, it has spread to hundreds of cities around the world. PB is a practice that deepens democracy, builds stronger communities, and creates a more equitable distribution of public resources. Several cities in the United States, such as New York, Chicago, Durham, Cambridge and Somerville have adopted and implemented PB processes to increase the civic and budget engagement of its residents. For more information about Participatory Budgeting, visit [participatorybudgeting.org](https://participatorybudgeting.org).

While the basic concept remains the same across cities, the process for implementation of Participatory Budgeting may vary due to local factors. Municipalities often go through several iterations of process improvements to enhance the program's effectiveness, efficiency, and impact over time.

## **PARTICIPATORY BUDGETING IN BOSTON**

In Boston, [Youth Lead the Change](#) (YLC) was established in 2014 as the City's first youth-led Participatory Budgeting initiative. The process is currently led by the Office of Youth Engagement and Advancement and invests one million dollars of the City's capital budget to give young people the power to decide how to spend it for the benefit of their communities. Boston resident youth aged 12 to 22 who live, work, or go to school in the City are able to participate in the process by submitting ideas and voting on the finalists. Youth Lead the Change runs yearly from October through June and includes:

- Evaluation and Updates (October)
- Idea Collection (November - January)
- Idea Sorting and Ballot Creation (February - March)
- Voting (April - May)
- Votefest- Winning Projects Announcement (June)

## **THE OFFICE OF PARTICIPATORY BUDGETING**

In the 2021 Municipal Election, Boston voters approved a ballot measure to create the Office of Participatory Budgeting. As a result, an [Ordinance](#) establishing the Office was approved by the City Council in the Spring of 2023.

The mission of the Office of Participatory Budgeting is to provide an official point of entry for Boston residents to contribute to the City's budget process. OPB advances this mission by:

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

### **[OPB plans to host yearly Participatory Budgeting cycles to allow for continuous public engagement in order to:](#)**

1. Offer opportunities for the public to propose creative new ideas to address local needs;
2. Gauge resident priorities to inform the City's annual budget process.

## GUIDING PRINCIPLES

The Office of Participatory Budgeting and its External Oversight Board defined a set of foundational values to help guide the Office's operations, goals, and strategies for implementing Participatory Budgeting in Boston.

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

## EQUITY FRAMEWORK

Boston's Participatory Budgeting Equity Framework consists of an Equity Statement, Equity Goals, and Equity Guidelines. These components provide a framework to operationalize and help to reinforce equity throughout the PB process. The Office will work closely with the Board and the public on refining how guidelines will be used during the PB cycle.

### Equity Statement

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

## Equity Goals

### 1. Foster a Collective City

Participatory Budgeting is an opportunity to bring communities together to foster a collective vision for Boston. Residents, local leaders, and City officials will unite in open dialogue about budget priorities, engage in shared decision-making in the PB process, and take collective action in shaping the future of the City. The intent will be to enhance the quality of life for all who call Boston home—a place where dreams can flourish, safety is paramount, opportunities are plentiful, and community thrives.

### 2. Enhance Civic Engagement and Strengthen Community Trust

The Participatory Budgeting process is committed to addressing barriers for public participation in local government, strengthening connections, and cultivating trust in the process. Community partners will co-lead efforts in identifying new opportunities to maximize resident participation, ensuring the creation of safe, inclusive, and culturally appropriate spaces where education, resources, and decision-making is shared. Through this process, residents will help inform funding decisions that reflect their priorities and lived experiences.

### 3. Address Ongoing Inequities Originating from the Historical Legacies of Institutions of Power

The City of Boston acknowledges its role in causing and perpetuating inequities in our society. Through Participatory Budgeting, the Office is committed to a process that gives voice to the diverse perspectives and interests of residents, with emphasis on investing and engaging those who have been historically excluded in decision making processes. As different communities require unique approaches to achieve fairness and equity, the PB process will invest and prioritize targeted and intentional investments that have the greatest impact.

## Equity Guidelines

**Equity:** Historical legacies of institutions of power have shaped differences in access and power in the community. These disparities include the social, economic, structural and other barriers to the health and well-being of residents. Projects will address ongoing and identified inequities in communities.

**Priority:** Projects will engage all Boston residents, including priority populations such as residents who (1) cannot or do not participate in local government decision making; (2) residents who have been historically excluded or underrepresented; and (3) residents living in historically underserved neighborhoods.

**Impact:** Projects will meaningfully improve the residents' quality of life. It will remove barriers to accessing an existing resource and/or provide a resource to a part of the community which did not previously have access.

## **ROLES AND RESPONSIBILITIES**

**The Office of Participatory Budgeting (OPB):** The Office is responsible for designing the process, establishing policies and procedures, implementing, and evaluating Participatory Budgeting in the City of Boston. OPB's role is to execute the City's mission and goals outlined in the PB Ordinance. Additionally, the Office is responsible for facilitating partnerships and relationship building between City Departments, residents, community organizations, and other stakeholders to contribute to the PB process and City's budget. The Office is also charged with creating and amending the Rulebook on an annual basis in consultation with members of the External Oversight Board.

**External Oversight Board:** Nine (9) board members oversee and support the Office of Participatory Budgeting in the development and implementation of the PB process. Board term appointments last for two-years.

**Residents:** City of Boston residents are encouraged to participate in the PB process by submitting project ideas, reviewing and evaluating Community Priorities, drafting proposal statements for the ballot, and voting for their top proposals.

**City Departments:** Departments work collaboratively with OPB and the External Oversight Board to assess feasibility of project ideas, determine cost estimates, and support the implementation of PB projects.

**Community Partners:** Selected Community Organizations will be contracted to engage, educate, and promote the participation of hard-to-reach populations in the PB process. Community Partners will be identified prior to the Idea Collection Phase.

**Community Organizations:** Local groups across the City are encouraged to promote resident engagement during each phase of the PB process and may have the opportunity to apply for funds to implement winning ballot proposals by way of grants or contracts.

## **EXTERNAL OVERSIGHT BOARD**

The Office of Participatory Budgeting has an External Oversight Board of nine (9) Boston residents with experience and expertise in various topics relevant to Participatory Budgeting, including but not limited to community investment and development, public finance, open space, urban planning, community organizing, affordable housing, public education, public health, environmental protection, historic preservation, and a demonstrated history of civic involvement in their communities.

External Oversight Board members oversee and support the Office of Participatory Budgeting in the development and implementation of PB in the City.

**Members of the External Oversight Board for the 2024 and 2025 PB Cycles are:**

- **Betsy Cowan Neptune**, Executive Director, BUILD
- **Carla Stovell**, Board Member, New England United 4 Justice
- **Carolline de Paula**, Director of Adult Education, Jackson Mann Community School
- **Esther Chong Weathers**, Associate Director of Diversity, Inclusion, and Belonging at the Harvard Graduate School of Design
- **Jarret Wright**, Director of Cybersecurity, Massachusetts Port Authority
- **Jim Kennedy**, Retired member of the Office of Budget Management, City of Boston
- **Khalid Mustafa**, Coaching Supervisor, Fathers' Uplift
- **Lisa Hy**, Program Manager, Tufts Medical Center Community Benefits and Health Initiatives
- **Marilyn Forman**, Director of Community Organizing and Resident Engagement, Codman Square Neighborhood Development Corporation

**NOTE:** Board members will be reimbursed for transportation expenses incurred in the performance of their duties, such as parking and transit tickets.



## 2. PROJECT ELIGIBILITY

### CRITERIA FOR ELIGIBLE PROJECTS

The PB process prioritizes project ideas that build collective capacity on issues of social and racial justice. Project ideas must meet the the following eligibility criteria:

- Projects are limited to a one-time expense, and do not create new permanent positions.
- Project ideas must be feasible to implement, and be consistent with existing City policies, laws, regulations, and the Participatory Budgeting Ordinance.
- Projects must be implemented or managed by the appropriate City Department or agency receiving direct budget appropriations.
- Project ideas may include programs and services, as well as physical infrastructure such as technological improvements and community enhancements on City-owned public property.
  - ◊ *Infrastructure projects on private, state or federal property are not eligible, such as projects concerning the Department of Conservation & Recreation (DCR) or the Massachusetts Bay Transit Authority (MBTA).*
  - ◊ *Project ideas related to programs and services in facilities not owned by the City are eligible.*

### Project examples that are eligible for funding:

- Funding for community programs to strengthen mental health among Boston youth
- Workforce training for residents re-entering society after incarceration.
- Parenting education classes for single and teen parents.
- Digital literacy classes for senior citizens to learn new skills and promote social connections.
- Vocational training and financial literacy for low-income residents.
- Expand the City's Wicked Free WiFi network to reach more low-income areas.
- Enhancing public spaces through infrastructure projects, such as public art, street trees, benches, playgrounds, etc.
- Invest and equip community centers with computers for residents to search and apply for jobs.
- Increase access to fresh and healthy food through community garden programs or community fridges administered by local organizations.



### Project examples that are ineligible for funding

- Paying for the salary of a public employee to provide services.
- Repairing or enhancing a privately owned building.
- Helping an organization renovate a space that it rents from a private landlord.
- Helping a religious institution repair its sanctuary.
- Increase the frequency of MBTA buses or trains.
- Increase surveillance, policing, and/or other measures that negatively and disproportionately impact residents.

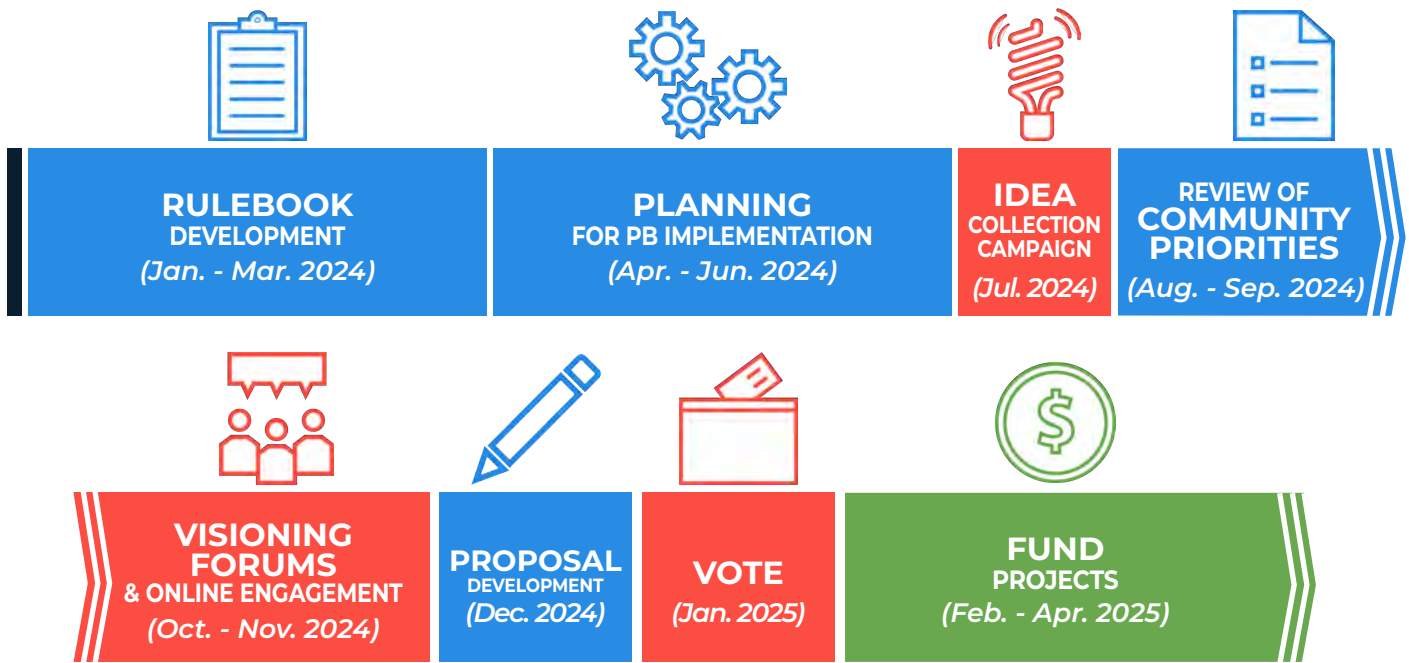
**NOTE:** Project ideas containing inappropriate, offensive, or derogatory language will be removed and not considered from the PB process.

Before being submitted for public vote, project proposals with estimated costs will be reviewed in advance by the appropriate City department or agency, and must be certified by the City's Chief Financial Officer.

# 3. TIMELINE

The overall timeline and phases for Participatory Budgeting may change slightly due to process refinements during the pilot year.

**FIGURE 1: PB PROCESS TIMELINE AND DATES**



## PHASES AND ESTIMATED DURATION

Phase	Estimated Duration
Rulebook Development & Planning for PB Implementation	6 months
Idea Collection	1 month
Review of Community Priorities	2 months
Visioning Forums & Online Engagement	2 months
Proposal Development	1 month
PB Voting	1 month
Funding Projects & Implementation Monitoring	3 months +
Evaluation	Entire PB Cycle 1

# 4. PHASES



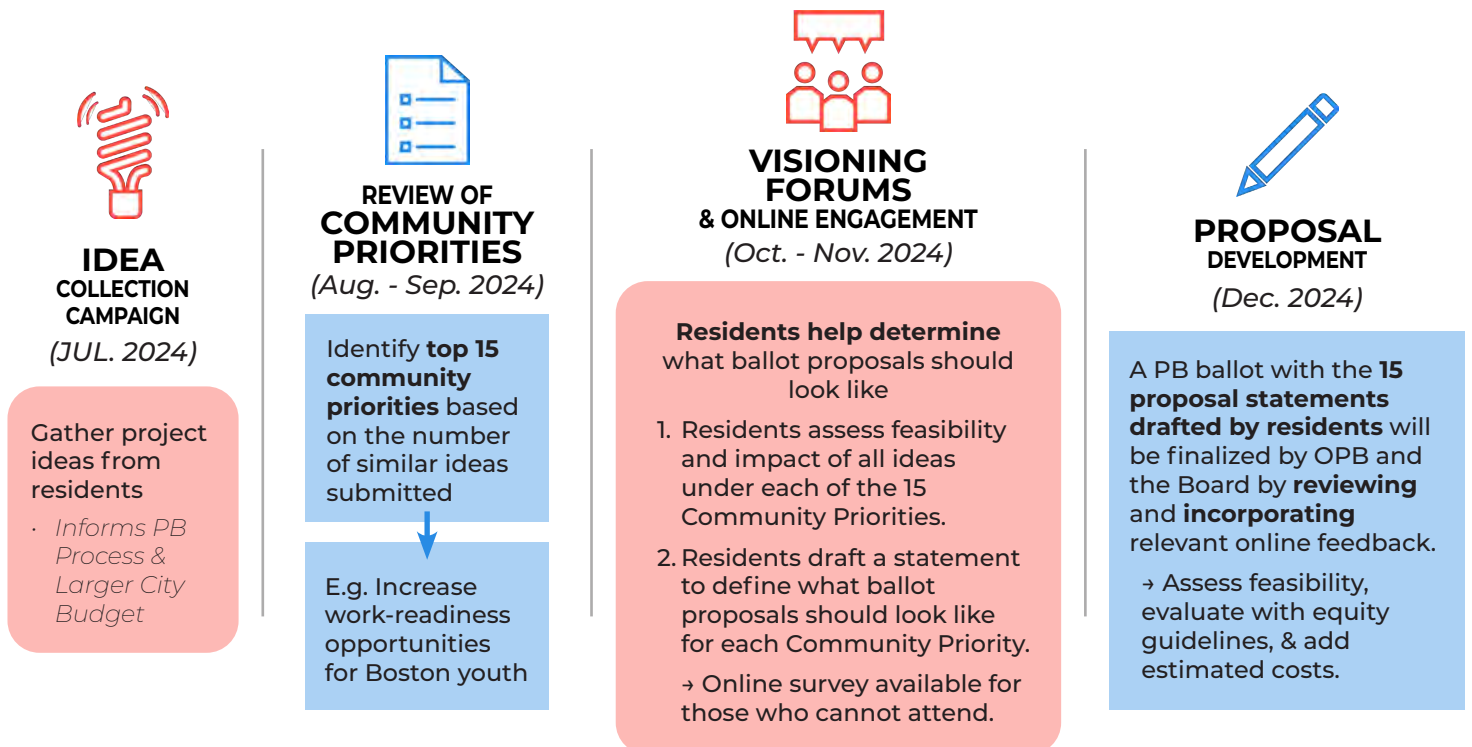
## RULEBOOK DEVELOPMENT & PLANNING FOR PB IMPLEMENTATION (JANUARY - JUNE 2024)

OPB staff and members of the External Oversight Board met on a weekly basis from January through early April 2024 to establish the parameters and procedures that will guide the implementation of Participatory Budgeting in Boston. During these meetings, OPB and the Board defined the overall framework and timeline for implementation. Meetings were open to the public and resident feedback was solicited, considered, and incorporated into the process.

Between April and June 2024, the Office will begin planning for PB implementation to ensure all details are thoroughly prepared for the launch of this City-wide initiative.

The following image provides a high-level overview and example of the PB process from Idea Collection through Proposal Development.

**FIGURE 2: PB PROCESS EXAMPLE (FROM IDEA TO BALLOT PROPOSAL)**





## IDEA COLLECTION CAMPAIGN (JULY 2024)

The Office of Participatory Budgeting will leverage technology and community partnerships to ensure that Boston residents are able to submit project ideas to the City. The public engagement strategies below will allow the public to connect with OPB online and in their communities:

- **Online “PB Portal”:** Similar to Cambridge, Somerville, and other municipalities across the nation, OPB will have a dedicated website for the public to learn about Participatory Budgeting, submit their project ideas, and follow each step of the process. The Online PB Portal will clearly state eligibility criteria for project ideas and allow residents to see all submitted ideas across the City. The site will be mobile friendly, easy to navigate, and accessible in Boston’s top languages.
- **Idea Collection Workshops:** To ensure the participation and engagement of hard-to-reach populations, OPB will contract with selected community organizations to assist with outreach, public education, and resident engagement. Contracted Community Partners will host City-sponsored Idea Collection Workshops in various neighborhoods across the City. The selection of Community Partners will be determined in consultation with the External Oversight Board during the Planning for Implementation Phase.

**NOTE:** An Idea Collection Toolkit will be available online for any community organizations that would like to host their own Idea Collection Workshops. Attendees will be encouraged to submit their ideas via the online PB Portal.

- **PB Phone Line:** A designated phone number will be available for residents to call and submit their project ideas. When calling, a multilingual message will instruct the public on how to share their ideas verbally with the Office. If residents call the City’s 311 Constituent Services Center, the Center will be able to direct them to the PB Phone Line.
- **PB Corners at Boston Public Libraries & City Hall:** In partnership with the Boston Public Library, branch locations across the City will have “Participatory Budgeting Corners,” where residents will be able to submit their ideas. PB Corners will also be available at Boston City Hall.

## IDEA COLLECTION GUIDELINES

The following guidelines will be used at the onset of the PB process:

### Who can submit project ideas?

- Only City of Boston residents, regardless of age.
- Members of the External Oversight Board cannot submit project ideas.

### What type of information will be required from residents to submit ideas?

- First & Last Name
- Neighborhood of residence
- Zip Code
- *Optional:* Email address
- *Optional:* Preferred language

### How should project ideas be described?

- Name or title of the project idea
- A short description of the idea (50 words or less recommended)
- If the idea serves the entire City or a specific neighborhood or location
- How the project positively impacts the community and/or advances social and racial equity (Recommend 50 words or less)
- The category the idea belongs to (**Drop down menu**)
  - **Arts & Culture:** Project ideas focused on arts and cultural programming that promote cultural spaces in the City.
  - **Community Resources:** Project ideas that provide assistance or services to residents in need, such as programs at community centers, financial or digital literacy, English as a second language, or GED classes.
  - **Local Economy & Worker Empowerment:** Project ideas that improve access to quality jobs, skills training, career pipelines, and other resources for workers, small business owners, and entrepreneurs.
  - **Education, Youth & Families:** Project ideas related to education for all ages, as well as proposals that meet the needs of Boston's youth, senior citizens, and families.
  - **Environment, Sustainability, and Food Access:** Project ideas that help increase access to healthy and affordable food, promote environmental justice, and help increase the quality of life in Boston.
  - **Facilities, Parks & Recreation:** Project ideas that invest in clean, green, safe and accessible open space, facilities, and programming for residents and neighborhoods.



- **Health and Well-being:** Project ideas that promote the physical and mental health of Boston residents of all ages.
- **Public Safety:** Project ideas that advance safety and increase justice in the City, such as community violence prevention programs and initiatives for healing and recovering from trauma and substance abuse.
- **Streets & Sidewalks:** Project ideas that improve and promote safe and accessible streets and sidewalks to get around the City.
- **Other / Not Sure:** Other community-centered ideas that may not fit in the previous categories.

### Demographic Data

- The Office of Participatory Budgeting will prompt residents to respond to an optional demographic survey during public engagement phases (Idea Collection Campaign, Visioning Forums, and Voting)



## REVIEW OF COMMUNITY PRIORITIES (AUGUST - SEPTEMBER 2024)

The goal of this phase is to assess the eligibility of all collected ideas and to identify 15 Community Priorities.

The Office of Participatory Budgeting will review the comprehensive list of project ideas to ensure they meet the eligibility criteria for the process. Ideas that do not meet the eligibility criteria will be displayed on the website with a general explanation of why they were not accepted.

Then, in partnership with the City's Data Analytics team and working closely with the Board, OPB will conduct a qualitative analysis of all eligible ideas to identify Community Priorities. This will be done by sorting and classifying all ideas to determine the frequency of similar types of ideas that emerged from residents across the City. Examples of Community Priorities could be: "Increase work-readiness opportunities for Boston youth," or "Funding adult education programs, such as GED prep, English and citizenship classes."

The top 15 Community Priorities will retain all eligible, original resident ideas and be carried through for consideration at Visioning Forums. No ideas will be modified or changed at any point by the City or the Board.

Ideas not selected as part of the top 15 Community Priorities will be incorporated into a "Summary of Findings" document to help inform the larger City budget conversation. The summary will be made available to City departments, elected officials, and the public. Meetings held with the Board during this phase will be open to the public.

Additionally, all project ideas submitted for the current cycle will be visible online via the Online PB Portal.



## VISIONING FORUMS & ONLINE ENGAGEMENT (OCTOBER - NOVEMBER 2024)

During this phase, residents will engage with relevant City Departments to review, discuss, and assess the feasibility, impact, and equity considerations of all ideas under each of the 15 Community Priorities. Through this process, residents will formulate a statement to help define what ballot proposals should look like, which may include a short list of project ideas that best address each Community Priority. For residents who cannot attend these Forums, an online option will be available to provide feedback.

### OPB will provide several engagement touchpoints:

- **In-Person Forums:** In partnership with community organizations, OPB will host five (5) Visioning Forums across the City. Each forum will focus on three (3) Community Priorities, for a total of 15 priorities in five (5) forums. Forums are structured in this manner to ensure residents are able to focus on a manageable number of Community Priorities and engage in in-depth and meaningful discussions with each other.

Visioning Forums will be centered around facilitated table discussions, which will allow attendees to review, discuss, and assess ideas and priorities with relevant City Departments. The outcome of these Forums will be a draft ballot proposal statement that incorporates eligible and original resident ideas for the Proposal Development stage.

- **Online Engagement:** As residents attend in-person forums, Bostonians who cannot attend these meetings, or those who chose to engage virtually, will be asked to provide feedback for each Community Priority via an online survey.



## PROPOSAL DEVELOPMENT

& BALLOT DESIGN

(DECEMBER 2024)

During Proposal Development, a PB ballot with the 15 proposal statements drafted by residents will be finalized by OPB and the Board by reviewing and incorporating relevant online feedback. OPB and City Departments will conduct a final feasibility assessment for each ballot proposal and determine estimated costs.

Preparation for Proposal Development will occur throughout the Visioning Phase, as residents provide feedback on each of the community priorities via in-person forums and online. Draft proposals will be finalized in December for in-person and online voting in January.



## VOTE

(JANUARY 2025)

A ballot with 15 proposals will be available for voting in January. Residents will be able to vote online and in-person sites at City Hall and Public Libraries Branches across the City. The Office of Participatory Budgeting will leverage existing City events and explore partnerships with community organizations for voting outreach.

On the ballot, residents will be able to select up to five (5) of a total of 15 proposals, each with an estimated dollar amount. Proposals with the most votes will be awarded, up to the funding cap for the particular PB Cycle. For voting assistance, the public will be able to email [pb@boston.gov](mailto:pb@boston.gov) or call the PB Phone Line.

- **Resident information needed to submit their vote:**

- First & Last Name
- Neighborhood
- Zip Code
- Email address
- Short affidavit stating that individuals must meet Boston residency requirements to be able to vote

**NOTE:** Voting is limited to Boston residents who are at least 11 years of age or in 6th grade.

When the voting period closes, the City and OPB will announce the winning proposals, with the final voting results published in OPB's website. In the event of a tie, OPB in collaboration with its External Oversight Board will resolve the tie.





## FUNDING PROJECTS & IMPLEMENTATION MONITORING (MAY 2025 - ONWARD)

The Office of Participatory Budgeting will work with its Board and relevant City Departments to determine the most appropriate avenue for project implementation. Two options:

### 1. City Departments Implement Winning Projects

- OPB will work with City Departments to define a timeline and create an implementation plan.

### 2. Contracts or Grants with Community Organizations to Implement Winning Projects

OPB, in collaboration with relevant City Departments, may release grant or contract opportunities for community organizations to propose or implement projects that address winning proposals, and are tailored to the needs and priorities of their particular communities. This process will need to comply with the City's procurement policies and all relevant Massachusetts laws for contracts and grants.

- OPB, in partnership with its External Oversight Board, will create the appropriate public process (i.e., a Request for Proposals or a Grant Application) to select community organizations for contracts or grants.
  - The review process will help ensure that grants/contracts awarded by the City for project implementation meet the purpose and values of the PB Ordinance.
  - As part of the contract or grant process, community organizations may submit letters of recommendation or references to be considered as a supplement to their proposal submission.
  - After funding is awarded through a contract or a grant, project implementation will be monitored by OPB and the relevant City Departments.
- **Monitoring the Implementation of PB Projects**

The Office of Participatory Budgeting will track and report on the progress of PB funded projects on its website and annual reports.

- **For PB Projects Implemented by City Departments:** *The Office of Participatory Budgeting will partner and coordinate with City Departments that receive PB funding to determine project timelines and milestones.*
- **For PB Projects Funded via Grants or Contracts with Community Organizations:** *OPB will create monitoring and reporting protocols to ensure that community organizations that receive PB funding have the necessary guidelines and support to deliver and then report back on successful outcomes.*



## EVALUATING

PB CYCLE 1

(JULY 2024 - APRIL 2025)

Evaluation is a critical part of improving the Participatory Budgeting process for future cycles. As such, OPB will contract with an evaluation consultant to assess the outcomes of this pilot year from Idea Collection through Project Award. OPB and the Board will review the final evaluation report and identify opportunities to enhance the program's effectiveness, efficiency, and impact.



# GLOSSARY OF TERMS

Terms	Meaning
<b>Ballot</b>	A ballot is a document used to cast votes in an election, and may be found as a piece of paper or webpage for voting. The PB Ballot will contain 15 project proposals for residents to choose which ones should be funded.
<b>Community Priority</b>	A community priority is defined as a need, interest, or desire as identified by a collective group of residents. This is determined based on the number of similar ideas submitted by residents during Idea Collection.
<b>Community Partner</b>	A non-profit organization that is contracted by the Office of Participatory Budgeting to host Idea Collection Workshops and/or Visioning Forums. The Office will contract with five (5) community partners in cycle one to ensure the participation of hard-to-reach populations.
<b>Community Organization</b>	Any non-profit group in the City that supports the PB process by assisting with public education and encouraging the participation of community members in all phases of the PB process.
<b>Contract</b>	A method for procuring supplies or services for the benefit or use of the governmental body (in this case, the City of Boston). During the Funding Phase of the PB process, private or nonprofit organizations may have the opportunity to contract with the City to implement projects locally.
<b>Cycle</b>	References a time frame to complete one round of Participatory Budgeting (PB). For example, Boston's PB cycle one begins in July 2024 and ends in April 2025. Cycle two begins in July 2025 and runs through April 2026.
<b>Eligibility Criteria</b>	A set of requirements that a project idea must meet for it to be included in the Participatory Budgeting process.

<b>Terms</b>	<b>Meaning</b>
<b>Equity &amp; Inclusion</b>	Equity is ensuring every community has the resources it needs to thrive in Boston. This requires the active process of meeting individuals where they are. Inclusion is engaging every resident to build a more welcoming and supportive City. This means building a city for everyone, where diversity makes a more empowered collective.
<b>Idea Collection Workshop</b>	<p>An event led by any community organization or individual, where attendees will be able to learn about the Participatory Budgeting process, brainstorm project ideas, and submit them as part of the PB process.</p> <p>OPB will contract with five (5) Community Partners to host a total of 15 City-sponsored Idea Collection Workshops to connect with hard-to-reach populations across the City.</p>
<b>Feasibility</b>	The process of determining the possibility that something can be made, done, or achieved. For example, how easy or difficult it may be to accomplish a project idea.
<b>Grant</b>	Funding provided to nonprofit organizations and/or individuals to carry out a public purpose of support through a formalized grant agreement. During the Funding Phase of the PB process, nonprofits and/or individuals may be able to apply for grants from the City to implement projects locally. Please note that businesses are not eligible for grant funding.
<b>Phases</b>	A distinct period or stage in the Participatory Budgeting process. The PB process in Boston has six (6) distinct phases: Idea Collection, Review of Community Priorities, Visioning Forums and Online Engagement, Proposal Development, Voting, and Funding Projects.
<b>Pilot Year</b>	Refers to the first year of Boston's Participatory Budgeting initiative. This pilot year will serve the Office to test the proposed approach for PB in Boston and evaluate its effectiveness for continuous improvement over time.

Terms	Meaning
<b>Project Idea</b>	Project ideas are suggestions made by residents about how the City should spend Participatory Budgeting funding. Project ideas can be local or City-wide, and can be related to physical improvements on City property and programs and services in the community. Any resident of Boston can submit a project idea during the Idea Collection Phase.
<b>Project or Ballot Proposal</b>	The formal written description of a project idea that is submitted for PB voting. For the purposes of PB in Boston, project or ballot proposals are refined Proposal Statements (description below,) which were developed by residents during the Visioning Forum Phase.
<b>Proposal Statement</b>	A short paragraph drafted by residents during Visioning Forums that describes what a ballot proposal should look like for PB voting. A proposal statement may contain one or a combination of project ideas that residents consider best addresses a community priority.
<b>Social and Racial Justice</b>	The just and fair inclusion of people of any social and racial background into society, so they can participate, prosper, and reach their full potential.
<b>Visioning Forum</b>	A City-sponsored event where residents will be able to review, discuss, and assess the feasibility, impact, and equity considerations of all ideas under each of the 15 Community Priorities. At these events, attendees will prioritize project ideas and help draft project proposal statements for the ballot.

