

# IDEAS *in* ACTION

*External Oversight Board Meeting*

*March 20, 2025*



Office of  
Participatory  
Budgeting

CITY of BOSTON

# AGENDA

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- 6:00 pm: **Agenda Overview**
  - *Motion to adopt meeting minutes*
  - *Board Meetings Schedule*
- 6:10 pm: *Evaluation Findings*
- 7:00 pm: *Proposed Rulebook Updates*
- 7:45 pm: **Public Comment**
- 8:00 pm: **Closing**

# BOARD MEETING SCHEDULE

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<b>Date</b>	<b>Board Meeting Topic</b>
<b>April 3, 2025</b> <i>(Thursday, Virtual)</i>	<i>Incorporation / Responding to Feedback</i> <i>Project Implementation Updates</i>
<b>April 17, 2025</b> <i>(Thursday, Virtual)</i>	<i>Adopting Updated Rulebook</i> <i>Cycle 2 Next Steps</i>

# MEETING MINUTES

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

**Note:** Minutes will be posted in OPB's website, [www.boston.gov/participatory-budgeting](http://www.boston.gov/participatory-budgeting)

**EVALUATION  
FINDINGS: RULEBOOK**



# PROPOSED RULEBOOK UPDATES



# CYCLE ONE ACCOMPLISHMENTS



## Idea Collection (July - August 2024)

1,238 ideas were collected through multiple channels.

- Online PB Portal
- 19 Co-Sponsored Idea Collection Workshops
  - Nine (9) Community Partners
  - 560 Participants throughout workshops
- PB Corners at City Hall and BPL Branches
- PB Phone Line



## Visioning Forums (October 2024)

15 project proposals were drafted by Boston residents with support from OPB and City Departments.

- Three (3) in-person Visioning Forums hosted in East Boston, Roxbury, and Dorchester with ~100 resident participants in total.
- 20 City Departments attended Visioning Forums and took part in Proposal Development.



## PB Voting (January - February 2025)

- 14 ballot proposals available for PB Voting
- ~4,460 votes collected during online and in-person voting
- 4.35 (high) average number of projects selected per voter
- Highest voter turnout in Dorchester, Brighton, Roxbury, East Boston, South Boston, and Hyde Park



## Media Campaign (Idea Collection + Voting)

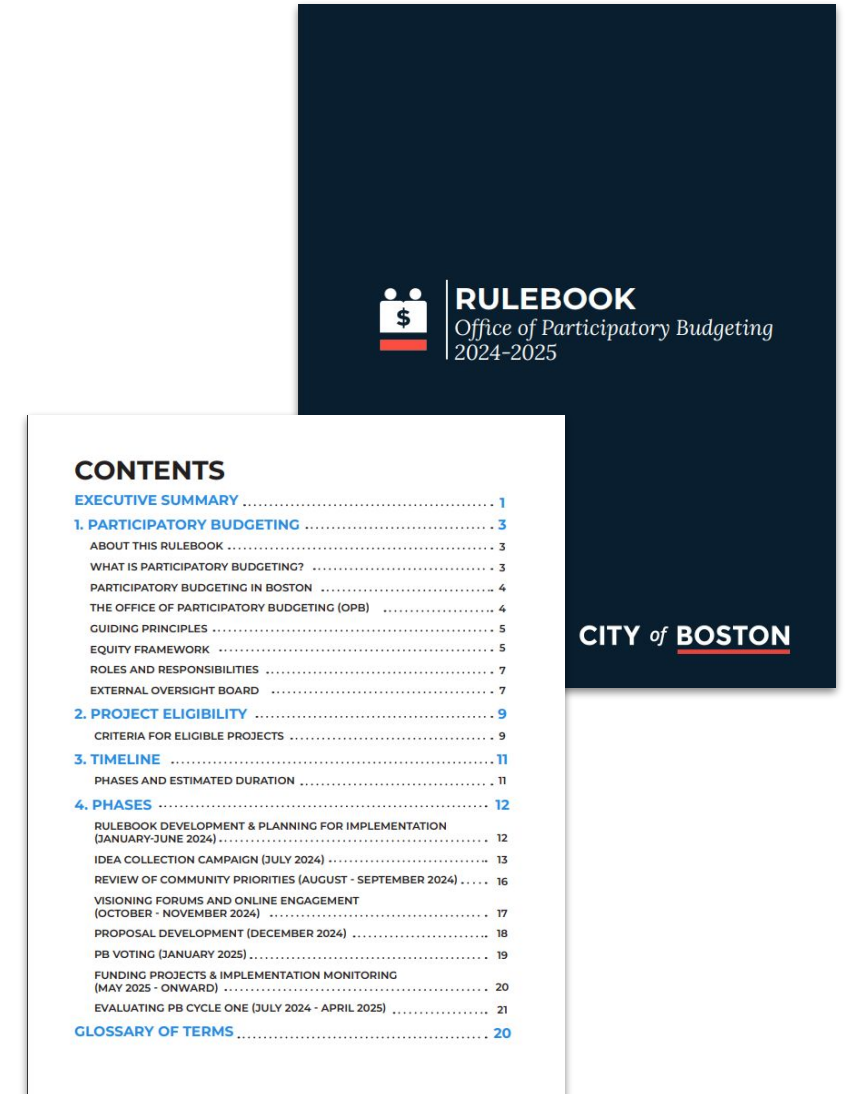
- 10 earned media placements across mainstream and ethnic media outlets + 3 mainstream media interviews
- 3.5M total impressions\* during Idea Submission + Voting
- ~20M total digital clicks: digital newspapers, ads, + social
- 750+ Radio spots aired with 883,200+ impressions
- Outreach in six (6) Languages: English, Spanish, Brazilian Portuguese, Haitian Creole, Vietnamese, Chinese

\*The total number of times a piece of content is displayed to users, regardless of whether they engaged with it or not.

# RULEBOOK UPDATE

## Details of the Update:

- **The Rulebook should act as a reference guide for implementation**
  - Language offers general guidance for each phase and the general PB process
- **Flexibility for implementation**
  - Provides OPB/ EOB the opportunity to refine details, as needed.





# RULEBOOK CONTENT

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## EXECUTIVE SUMMARY

### SECTION 1. PARTICIPATORY BUDGETING

ABOUT THIS RULEBOOK

WHAT IS PARTICIPATORY BUDGETING?

PARTICIPATORY BUDGETING IN BOSTON

THE OFFICE OF PARTICIPATORY BUDGETING (OPB)

GUIDING PRINCIPLES

EQUITY GUIDELINES

ROLES AND RESPONSIBILITIES

EXTERNAL OVERSIGHT BOARD

### SECTION 2. PROJECT ELIGIBILITY

CRITERIA FOR ELIGIBLE PROJECTS

## SECTION 3. TIMELINE

PHASES AND ESTIMATED DURATION

## SECTION 4. PHASES

RULEBOOK DEVELOPMENT & PLANNING FOR  
IMPLEMENTATION

IDEA COLLECTION CAMPAIGN

REVIEW OF COMMUNITY PRIORITIES

VISIONING FORUMS AND ONLINE ENGAGEMENT

PROPOSAL DEVELOPMENT

PB VOTING

FUNDING PROJECTS & IMPLEMENTATION MONITORING

EVALUATING PB CYCLE ONE

## GLOSSARY OF TERMS

**Yellow Highlight** - Indicates updates proposed

# RULEBOOK CONTENT- SUMMARY OF PROPOSED CHANGES

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## EXECUTIVE SUMMARY

- Update brief Executive Summary based on changes proposed

## SECTION 3. TIMELINE

### PHASES AND ESTIMATED DURATION

- Combine Visioning Forums + Proposal Development into one phase “Proposal Development”

## SECTION 4. PHASES

### IDEA COLLECTION CAMPAIGN

- Expand the number of community organizations participating in “Contract Partnerships” during the PB process
- Slight revisions to “Guidelines for Idea Collection”
  - Replacing Neighborhood with Zip Code requirement
  - Incorporate demographic information in Idea Submission form

### REVIEW OF COMMUNITY PRIORITIES

- Replace Community Priorities with the original (9) categories selected by residents during Idea Submission
- Slight revision in methodology to review ideas

### PROPOSAL DEVELOPMENT

- Combined “Visioning Forums” + “Proposal Dev.” phases into one phase
- Contractor to help promote, organize, facilitate event logistics
- OPB to restructure Visioning Forums format into a series of workshops

### VOTING

- Up to 15 proposals will be developed and finalized for Voting
- Incorporate demographic information in Voting ballot

# SECTION 3. TIMELINE

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Phase	Estimated Duration
Rulebook Update & Planning for PB Implementation	4 months (Mar - Jun)
Idea Collection Campaign	1 month (Jul)
Review of Community Priorities	2 months (Aug - Sep)
Visioning Forums and Online Engagement	2 months (Oct - Nov)
Proposal Development	1 month (Dec)
PB Voting	1 month (Jan)
Funding Projects & Implementation Monitoring	3+ months
Evaluation	Entire PB Cycle

## Proposed Changes

- Combine “Visioning Forums and Online Engagement” and “Proposal Development”
- Provides more flexibility in Oct-Dec to work concurrently on hosting workshops and refining proposals

# SECTION 4. PHASES *(Current)*

## → IDEA COLLECTION CAMPAIGN

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IDEA  
COLLECTION  
JULY 2024



REVIEW  
PRIORITIES  
AUG-SEPT 2024



VISIONING  
FORUMS  
OCT-NOV 2024



DEVELOPING  
PROPOSALS  
DEC 2024



VOTE ON  
PROPOSALS  
JAN 2024



FUND  
PROJECTS  
JAN 2024

### Idea Collection Engagement Strategies

- **Online “PB Portal”:** Dedicated website for the public to learn about Participatory Budgeting, submit their project ideas, and follow each step of the process.
- **Idea Collection Engagement:** 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.
- **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.
- **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.

# SECTION 4. PHASES (*Observations + Feedback*)

## → IDEA COLLECTION CAMPAIGN - ENGAGEMENT STRATEGIES

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- Involve a wider range of community organizations during the Idea Collection Phase + in other phases of the PB Process
- Diversify engagement opportunities beyond Idea Collection Workshops

### Updated Approach

- Thinking of an application process for community organizations to support Idea Collection efforts.
- Contract partners may choose to host an Idea Collection Workshop or **a combination of alternative engagement events such as tabling at events, door knocking, phone calls, etc.**
- Selected partners may **have the option to re-engage** with OPB during **Proposal Development** and **PB Voting**.

# SECTION 4. PHASES *(Revised Language)*

## → IDEA COLLECTION CAMPAIGN - ENGAGEMENT STRATEGIES

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### Current Rulebook Language

- **PB 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.

### Proposed Rulebook Language

- **PB 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 or **a combination of alternative engagement events such as tabling at events, door knocking, phone calls, etc.**, 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.

# SECTION 4. PHASES *(Current)*

## → IDEA COLLECTION CAMPAIGN - GUIDELINES FOR IDEA COLLECTION



**IDEA  
COLLECTION**  
JULY 2024



**REVIEW  
PRIORITIES**  
AUG-SEPT 2024



**VISIONING  
FORUMS**  
OCT-NOV 2024



**DEVELOPING  
PROPOSALS**  
DEC 2024



**VOTE ON  
PROPOSALS**  
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**FUND  
PROJECTS**  
JAN 2024

### Guidelines for Idea Collection

- **Who can submit project ideas?**
  - 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 (Recommend 50 words or less)
  - 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)
- **Categories (10 options includes “other”)**
- **Demographic Data**
  - Optional demographic survey

# SECTION 4. PHASES *(Observations + Feedback)*

## → IDEA COLLECTION CAMPAIGN - GUIDELINES FOR IDEA COLLECTION

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- Zip Code
  - Zip Code requirement was removed during Cycle One based on in person user testing recommendations
  - OPB utilized neighborhood as a proxy for zip code
- Demographics
  - Demographic survey was included in the optional evaluation survey at the end of the PB Portal website.
  - A limited number of participants completed the survey
  - Opportunity to better capture demographic of online participants

### Updated Approach

#### **Guidelines for Idea Collection:**

- Information required to submit ideas:
  - Remove Zip Code requirement- instead use “Neighborhood”

#### **Demographic Information:**

- Incorporate Demographics into Idea Collection Page
  - Identify 2-3 optional questions to include in main Idea Submission page
    - Race/ Ethnicity
    - Income
    - Age
  - Optional survey for the remaining questions



# SECTION 4. PHASES *(Revised Language)*

## → IDEA COLLECTION CAMPAIGN - GUIDELINES FOR IDEA COLLECTION

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### Current Rulebook Language

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

### Proposed Rulebook Language

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

- First & Last Name
- Neighborhood of residence
- Optional: Email address
- Optional: Preferred language
- Optional: Demographics (Race/ Ethnicity + Income + Age)

# SECTION 4. PHASES *(Current)*

## → REVIEW OF COMMUNITY PRIORITIES



IDEA  
COLLECTION  
JULY 2024



REVIEW  
PRIORITIES  
AUG-SEPT 2024



VISIONING  
FORUMS  
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DEVELOPING  
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VOTE ON  
PROPOSALS  
JAN 2024



FUND  
PROJECTS  
JAN 2024

Identify the top 15 community priorities that emerged from resident ideas across the City.

- **Eligibility Screening**
  - OPB will conduct an initial screening of ideas to determine eligibility based on criteria.
    - *Public property, within city limits, one time expense/ no new positions*
- **Determine Top Community Priorities**
  - Work with Data Analytics to identify the top 15 community priorities.
  - This is determined by the frequency of similar types of ideas that emerged from residents across the City.
- **Outcome**
  - 15 Community Priorities (and associated list of project ideas) will move onto the next phase
  - All eligible and original resident ideas are retained. No ideas will be modified or changed at any point by the City or the Board
  - NOTE: All project ideas will be visible and accessible via the Online PB Portal. All EOB meetings are open to the public.

# SECTION 4. PHASES (*Observations + Feedback*)

## → REVIEW OF COMMUNITY PRIORITIES

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- Rulebook outlined 15 Community Priorities (CPs) however nine (9) priorities identified during Cycle One
- Identifying CPs were extremely time and resource intensive
- Final nine (9) CPs closely aligned with the original 10 “Categories” identified as part of the Idea Submission survey.

### Original Rulebook Categories

1. **Arts & Culture**
2. **Community Resources**
  - *Inclusive Community Spaces and Cultural Enrichment Programs*
  - *Community Resources and Social Equity Programs*
  - *Housing Support and Resources*
3. **Local Economy & Worker Empowerment**
  - *Expanding Economic Opp*
4. **Education, Youth & Families**
  - *Youth Development and Opp*
5. **Environment, Sustainability, and Food Access**
  - *Urban Greening and Environmental Initiatives*
6. **Facilities, Parks & Recreation**
  - *Public Space Enhancements and Maintenance*
7. **Health and Wellbeing**
  - *Community Health and Well-being*
8. **Public Safety**
9. **Streets & Sidewalks**
  - *Transportation Safety and Access Initiatives*
10. **Other / Not Sure**

# SECTION 4. PHASES (*Observations + Feedback*)

## → REVIEW OF COMMUNITY PRIORITIES

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### Updated Approach

- Replace Community Priorities with the original (9) categories selected by residents during Idea Submission

### **Review of Ideas:**

- Review eligibility criteria (OPB, EOB)
  - *Public property, within city limits, one time expense/ no new positions*
- Categorization
  - *Review resident “tagged” category for ideas and re-categorize, as necessary*
- Identify Subcategories
  - *Data Analytics team to assist with identifying subcategories*

# SECTION 4. PHASES *(Revised Language)*

## → REVIEW OF COMMUNITY PRIORITIES

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### Existing Rulebook

- OPB 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.
- 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.
- 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.
- All project ideas submitted for the current cycle will be visible online via the Online PB Portal.

### Proposed Rulebook Language

- OPB will review the comprehensive list of project ideas **under preselected categories** to ensure they meet the eligibility criteria for the process. **The team will re-categorize ideas (as needed).**
- In partnership with the City's Data Analytics team and working closely with the Board, OPB will **identify specific subcategories to sort and classify resident ideas in preparation for Visioning Forums during Proposal Development.**
- **All eligible and original resident ideas will 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 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.
- All project ideas submitted for the current cycle will be visible online via the Online PB Portal.

# SECTION 4. PHASES *(Current)*

## → PROPOSAL DEVELOPMENT



**IDEA  
COLLECTION**  
JULY 2024



**REVIEW  
PRIORITIES**  
AUG-SEPT 2024



**VISIONING  
FORUMS**  
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### Visioning Forums

- 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 and help define what ballot proposals should look like
- 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.
- 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.

### Developing Proposals

- 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.
- Draft proposals will be finalized in December for in-person and online voting in January.

# **SECTION 4. PHASES** (*Observations + Feedback*)

## **→ VISIONING FORUMS & ONLINE ENGAGEMENT**

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- Rulebook outlined five (5) Visioning Forums
  - OPB hosted three (3) Forums
- Achieved the objective at each of the three forums, however it was an ambitious agenda
- Forum materials and content was quite dense and packed
- Needed more time for facilitator training
- Generally, proposals were broad and needed additional input from the public and City Departments
- Visioning Forums “phase” serve as an extension of Proposal Development “phase”- make this more integrated

# SECTION 4. PHASES *(Revised Language)*

## → VISIONING FORUMS & ONLINE ENGAGEMENT

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### Current Rulebook Language

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.

- **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

### Proposed Rulebook Language

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 category**.

- **In-Person Forums:** In partnership with community organizations, OPB will host **a series of** Visioning Forums across the City.
  - 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



# SECTION 4. PHASES *(Revised Language)*

## → PROPOSAL DEVELOPMENT

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### Current Rulebook Language

- 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.

### Proposed Rulebook Language

- **After the Visioning Forums** a PB ballot with **up to 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.
- Draft proposals will be finalized in December for in-person and online voting in January.

# SECTION 4. PHASES *(Revised Language)*

## → VOTING

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### Voting

- “A ballot with **up to 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.**
- **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
  - **Optional: Demographics (Race/ Ethnicity + Income + Age)**

**PUBLIC COMMENT**  
**15 minutes, 3 minutes per person**

