

Hear the voice, Make the change

10 ways to record and evaluate your
Participatory Budgeting project

Refreshed 2025





Cover and other images from the original 2017 report
and our PB image bank unless otherwise credited

Acknowledgements

This guide was originally supported by funding provided by the Scottish Government's Community Choices programme. We would like to thank the Scottish Community Development Centre (SCDC) for the framework used in action 7, Michael Touchton of the University of Miami for supplying information on Impact Evaluation in Appendix 4 and DemSoc for advice about online PB in Appendix 5.

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About Shared Future

Shared Future are dedicated to community empowerment. Experts in the field of Participatory Budgeting (PB), we operate across England, Scotland, Wales and Northern Ireland, developing meaningful community engagement programmes that really 'make people count'.

<https://sharedfuturecic.org.uk/>

Originally published June 2017

Updated July 2025



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Introduction

Hear the Voice, Make the Change

This report outlines 10 actions to take when you want to evaluate your Participatory Budgeting (PB) programme.

Designed for those leading a PB process, it explores:

- why an evaluation plan matters,
- discusses different approaches to collecting data, and
- includes a number of appendices for supporting your work.

Originally written in 2017, it has been extensively updated in this new version.

Our ten actions to evaluate PB

- 1: Agree outcomes before you start
- 2: Establish your baseline
- 3: Regularly gather feedback
- 4: Ask participants what was different
- 5: Keep track of the numbers
- 6: Use films to tell the story
- 7: Hold a stakeholder reflection event
- 8: Follow what happens next
- 9: Find and use your critical friends
- 10: Share your learning!



The importance of outcomes in PB

What is Participatory Budgeting?

Participatory Budgeting (PB) is an innovative democratic process which enables residents to have direct decision making powers over the allocation of resources.

Over a 40 year period, PB has demonstrated its effectiveness as a powerful method of community empowerment. PB often brings large numbers of new people into community engagement processes, as well as improving levels of understanding about public budgets. Fostering increased levels of trust between residents, elected members and public sector employees is central to its success.

PB operates across the world, and in many different forms.

PB began in the Brazilian city of Porto Alegre in the late 1980s, quickly establishing itself as a respected way of allocating a percentage of the city's budget, including the generation of proposals and then direct voting on them by residents. By 2000 around \$160m had been allocated in Porto Alegre through PB and it is widely cited as delivering many improvements in the lives of citizens. Leading academics, conducting independent impact evaluation, have demonstrated its effectiveness. PB then spread across South America and the world, with around 11,000 experiences recorded to date on every continent.

Internationally, PB at scale is increasing, and evidence exists that over a number of cycles PB brings improvements in terms of social equity, increased participation groups and creates trust in government. Our own website records some of these experiences and more are listed on the Participedia and PB Scotland websites. The quote below, by a local resident of Edinburgh and bidder in a PB process, typifies how PB can change relationships, for the better, between citizens and the public sector:

"It's really empowering for a community knowing their voice is being heard. That's really vital if you are trying to build a cohesive community".



Image taken from an Oxfam Blog: *What's the best way to measure empowerment*, by Duncan Green, 2014.

Soft outcomes are hard to measure

In PB in Porto Alegre a resident involved made a simple but crucial point:

'If it feels like we've decided, it's PB. If it feels like someone else has decided, it isn't'.

This is the deeply empowering feeling at the heart of PB. Citizens must believe that their participation is meaningful before they will engage.

PB has to also show it has benefits for politicians, in terms of improving democratic processes. It has to show to improve public accountability over public money whilst providing re-assurance and evidence to public officials that the time, energy and financial resources used are bringing real and measurable benefits.

How do we put a price on a smile, or score a sense of empowerment?

The challenge is to find ways that show citizens have had their voice heard and to explain what they valued about the process, without requiring citizens to adopt the often opaque language of public sector accounting and performance monitoring.

By demystifying PB evaluation processes we hope this guide helps in doing that, whilst ensuring some degree of rigour is maintained.

Why evaluating PB matters

What would it take to really grow PB?

This question was posed across Scotland following the Scottish Government's commitment to Local Authorities allocating significant public budgets through PB, as part of the Community Choices programme.

At a masterclass event in Edinburgh, co-delivered with Audit Scotland and attended by over 20 experts in public sector performance improvement, we attempted to address some difficult issues around measuring, auditing and evaluating PB. One of the participants commented:

“Values are central. It cannot become a tokenistic tick box exercise. But it could easily become so!”

The goal of Shared Future and of the Scottish Government is for PB to move beyond its predominant UK model of allocating small pots of money to voluntary and community groups, towards repeatedly distributing significant mainstream public budgets, in line with international practice.

Change doesn't just happen

PB has been used in the UK since around the year 2005, after a delegation of community activists from Salford and Manchester visited Brazil to understand how PB works and how it might be implemented in the UK.

Since then PB has evolved in many different ways. Much of that led by 'champions'; people who have become inspired by PB and so perhaps willing to take risks. They may see community empowerment as core to their life and their work. But PB often stops without evidence to back up that passion. With good evidence it is harder to ignore those champions by asserting they are biased or partial with their facts.

Keeping up momentum for PB requires continually reflecting on and refining on the work being done, whilst keeping true to the underlying purpose of the work. And then communicating that learning and experience in ways relevant to those who haven't yet been convinced.

Why good recording matters:

- ✓ You discover the story behind the results
- ✓ It paves the way to better projects
- ✓ Every voice counts, and with more voices the more trustworthy are the results
- ✓ One size does not fit all. Good evaluation requires planning and hard work
- ✓ DIY evaluation is possible. But having real auditable evidence brings greater trust.

Our ambition is that public services routinely offer some form of PB for mainstream budget choices and that as a norm citizens will expect it to be offered, and thereby;

- address inequalities in service provision and resource allocation
- engage and empower citizens within discussions on public budgets
- stimulate co-production and mutual responsibility between citizens and the state.

Terrifying but magnificent

These are ambitious goals, and proving they have been achieved is difficult. Hundreds of highly qualified evaluators are currently exploring the real economic value of public participation. Being able to say with authority that your work has made a difference is a daunting task.

Often evaluators take a very objective position. They search high and low for 'quantitative' (numbers based) evidence, and compare that with more 'qualitative' (values based) outcomes. Evaluation is a skill, one that underpins performance management frameworks, evidenced based commissioning and the annual budgeting process of public agencies.

There will be no one perfect approach. For example a participant in a PB programme reported that speaking for the first time in a public arena, and winning the support of her community for her idea was *'terrifying but magnificent'*. This represents a significant moment for them.

But for the community as a whole? That is harder to show. But it is essential if PB is to become the norm in public participation.

Our 10 actions for evaluating PB

Why having a plan is important.

Before you begin any project it is good practice to plan your evaluation. Once underway it's hard to go back and re-capture information about something; particularly people's perceptions. These are central to PB, but will change as a result of actually engaging with your programme. Or maybe they changed from factors beyond your process that happen at the same time? Do evaluation as early as you can, and begin to make records, conduct interviews or collate information before you start your process.

We propose you consider our 10 actions before designing your PB evaluation.

For each action we have tried to explain why they matter and how you can go about it:

What are our 10 evaluation actions?

1. Agree outcomes before you start
2. Establish your baseline
3. Regularly gather feedback
4. Ask participants what was different
5. Keep track of the numbers
6. Use films to tell the story
7. Hold a stakeholder reflection event
8. Follow what happens next
9. Use external experts as critical friends
10. Share your learning!

These are not linear steps. For example, before setting your outcomes or baseline, consider who you will be sharing your learning with. If your PB contains a digital aspect also look at Appendix 5.

What else to think about

Look at your available resources: Keep your evaluation work proportional to those resources, or you will add to the burden of actually doing your PB.

Consider what supporting information is available: Make use of statistics collated by others, such as local indexes of multiple deprivation, or surveys of public attitudes. Many local authorities and public agencies collect these as a matter of course.

Ask the experts: Universities and the VCSF sector are full of people experienced in doing

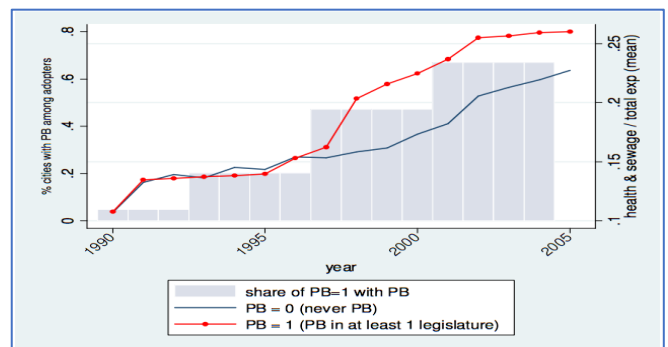
evaluations, or looking to use your work for their research. Approach them to see if they can provide advice, be your critical friend, or maybe even offer up their research students who may be looking for experience.

Consider how to isolate your PB results from other effects.

It has been recorded that in the first 5 years of PB in Porto Alegre (1989–1994) the percentage of the city that had adequate sewerage provision went up from 46% to 86%. And the number of students progressing to University doubled. Or that school truancy fell from 9% to 1%.

These and other similar findings from PB delivered at scale supports the claim that PB improves outcomes for populations from poorer communities. However, they may not solely be the result of PB! Those supporting PB were also keen to generally invest in social provision. A correlation (two things happening together) does not of itself prove causation (one thing leading from another). A good evaluation can however help make that case and unpick the relationships between cause and effect.

It's also recognised that deep change takes time. Even at scale it can take 5 years or more for statistical evidence of the effectiveness of PB to show. Yet, good evidence gathering, a control sample and robust impact evaluation has proved that done well, at scale, and over a period there is causation between PB and the reduction of poverty and inequality. As shown in the graph below:



Evolution of the share of expenditures in health and sanitation compared between adopters and non-adopters of participatory budgeting (Goncalves 2013).

1: Agree outcomes before you start

'Not everything that counts can be measured, and not everything that can be measured counts'.

Albert Einstein.

Before embarking on a PB process, it's crucial to decide what you are trying to achieve. And also, how your 'success' or 'failure' can be measured.

This is important as, if the proposed outcomes are not clearly stated beforehand, it is easy to be open to criticism based on unreal expectations. For example, a small sum of money, perhaps in the low thousands, coming from a community safety budget, won't reduce crime levels overnight. But it might help towards increasing levels of trust between the Police and the community, with beneficial long-term outcomes.

'Outcomes' are changes or differences you might expect from your work. Within community development, outcomes might include better access to healthcare provision, greater community safety, environmental improvements, or improved educational achievement.

At scale, the outcomes might be measurable against known statistics on the levels of reported crimes, on exam results, or other information. This is known as 'quantitative' evaluation. But, numbers can be contested; reported crime is not a measure of actual crime, or exam results the only indicator of educational excellence.

Still, it is important to recognise that 'softer', perhaps even small-scale outcomes are also valuable. Such as perceptions about the influence people feel they have within their communities, of levels of community cohesion, or trust in authority. These are often called 'qualitative' outcomes.

PB can contribute to both types of outcomes, and both generally form part of the community engagement reporting of a Local Authority and their strategic partners (such as the Police, Housing Providers, or the Health Service).

Measure apples against apples

PB processes have been implemented at widely different scales. In Porto Alegre, the 'home' of PB,

the PB programme, at its height, was influencing the allocation up to \$200 million of capital funding annually. With this level of investment, it is possible to measure quantitative outcomes. That is, how. Statistically, the outcomes or results have changed.

At the other end of the scale, a church congregation might allocate £5,000 through a PB voting process. At this level it would be impossible to measure numerical outcomes around crime, health improvements, or whatever. It is, though, very possible to collect anecdotal, qualitative data from smaller scale PB processes.



By using ballot boxes this PB project made a link between PB and voting in elections. Encouraging democratic participation was one of their desired 'soft' outcomes.

Small can be beautiful

In Manton, an ex-mining community in Nottingham, a survey of participants after a PB programme showed that almost 75% of residents felt they could influence Council decision-making processes. In two neighbouring areas who hadn't been engaged in PB, the figures were more or less reversed – only 25% of people thought they had influence. One respondent, having taken part in the PB process, commented: *'I feel I am somebody'.*

Share your proposed outcomes

It is helpful to agree outcomes upfront, as this will inform the design and delivery of your PB evaluation. For example, ask successful applicants to report how their project helped deliver against shared targets, identified through neighbourhood planning processes.

2: Establish your baseline

Most Participatory Budgeting (PB) programmes have widening engagement as one of their core aims. And not just overall engagement, but ensuring those who might not engage in more traditional processes are now being involved.

Before you decide to go ahead it's helpful to reflect on what you are trying to achieve. Are you interested in overall participation rates, participation in the decision-making events, or looking to see if a particular demographic or section of the community is participating?

You may also want to show the change in resident behaviours, and it's helpful to know who might normally participate and who doesn't.



Image from PB Unit's Comic Democracy project

When doing PB at scale, or over an extended period you will be looking for 'quantitative' measures, such as falls in unemployment, changes in crime rates, or improved life expectancy. That means you will need to do some initial research.

Establishing your baseline

A baseline is something you use to compare changes against. It's a record of where you start from or, to put it in more technical language, the existing conditions on the ground. A good way to start is to look at existing facts and figures about the communities in which your PB process is happening.

There are many ways to do this, such as looking at neighbourhood statistics. These are often kept up to date by local or national government bodies as they are already central to how services are planned and delivered.

Factors that help establish a baseline:

- The geographic area and its population
- The main economic force or driver in the area
- Levels of employment, deprivation or poverty
- Local health challenges, crime rates or educational attainment levels
- Demographics (age, gender, disability ethnicity etc) and information on the participation of groups in community life
- Migration (who is moving to or from the area)
- Political make-up, voting levels, who doesn't vote and whether this is changing over time
- Community trust in authority, or of the PB process, or other significant local opinions
- Levels of integration, conflicts over identity or cases of discrimination
- Levels of volunteering, community enterprise, of hope in the future, or social isolation.

"The truth about a city's aspirations isn't found in its vision, it's found in its budget."

Brent Toderian, City Planner, Canada.

Don't forget to record how money is being spent in the community. Policies are important, but we believe that it is at the moment that the budget is approved that real power is exercised. It's when ideas are turned into actions. Budget spend information of your local authority or a public agency in your area will support your baseline.

Before you start you might want to find out:

- How much is being spent by local public services or departments
- How much is being spent in each community
- How spending has been changing over time
- How much will be spent in the PB processes.

Once you have this information you can use it to compare how expenditure shifts in future, especially if you are looking at mainstream PB.

Collect your own data

Once you have established your baseline you will be ready to undertake the next step; collecting your own facts and figures to compare against it.

Next, we will show some ways to do this, and how to use your data to improve your practice.

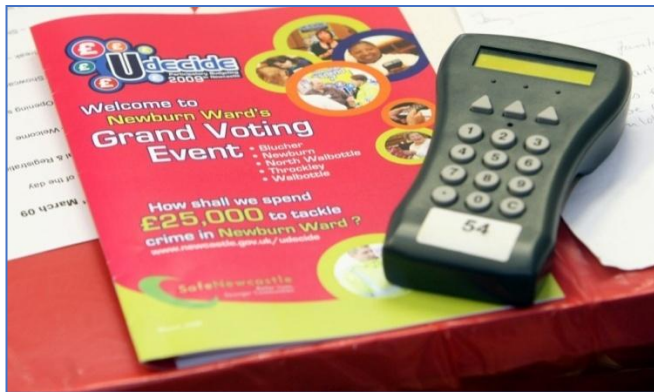
3: Regularly gather feedback

A feedback form is the most basic way of capturing views about an event or as part of a process and should not be overlooked. It remains a crucial element of any evaluation.

In terms of 'making the case' for PB, the responses relating to the value of the PB approach and desire to repeat the process can be powerful pieces of data going forward. But getting these takes planning.

A good feedback form requires striking a balance between asking enough questions to get back meaningful information, and keeping it short and simple enough to ensure a good response rate.

Depending on the format of the event or process in question, and peoples' abilities and willingness to respond in detail, a 'pick and mix' approach to the list on this page will be appropriate. People may have reservations around handing over 'too much' personal information. So you will probably need to keep their individual responses anonymous.



Voting handsets can also collect feedback at your PB event

Decide what you want to know

Below are suggested questions (beyond basic demographic information) you might include on your feedback form. Each has a suggested type of question in brackets and some suggested prompts for multiple choice questions. Choose those most appropriate in your case.

- ? Which neighbourhood do you live in? (Tick box): e.g. area a/ area b/ area c/ other
- ? How strongly do you feel you belong to your immediate neighbourhood? (Tick box): Very

strongly/ Fairly strongly/ Not Very strongly/ Not at all strongly/ Don't Know

- ? How many years have you lived in the area? (Tick box) 1-2/ 3-5/ 6-10/ 11-20/ more
- ? Overall, how satisfied or dissatisfied are you with your local area as a place to live? (Tick box): Very satisfied/ Fairly satisfied/ Fairly dissatisfied/ Very dissatisfied/Don't know
- ? Do you agree that you can influence decisions affecting your local area? (Tick box): Definitely agree/ Tend to agree/ Tend to disagree/ Definitely disagree/ Don't know
- ? Do you think PB is a good way of allocating public funds? (Tick box): Definitely agree, Tend to agree/ Tend to disagree/ Definitely disagree/ Don't know
- ? Do you feel able to influence decisions affecting your local area after today? (Tick box): A lot more able/ a bit more able/No change/ Less able/ Don't know
- ? Do you think it is important that communities have a say on how money is spent in your area? (Tick box): Yes/ No/ Don't know
- ? Have you found out more about your community as a result of participating today? (Multiple Choice) (if applicable): I met new people/ I found out about local groups/ I found out about how decisions are made/ Nothing that I didn't already know.
- ? How involved are you in your community already (not just this event)? (Multiple choice) I attend resident groups or local meetings/ I run a local organisation/ I volunteer with a local organisation/ Not involved/ Don't know.
- ? Have you enjoyed today's event? (Tick box): Yes/ No/ Don't know
- ? What did you enjoy the most? (Open text)
- ? What did you enjoy the least? (Open text)
- ? Has today's event given you any ideas on how to improve your community? (Tick box) Yes/ No/ Don't know
- ? Would you like to be involved if this event was repeated?(Tick box) Yes /No /Don't know
- ? If YES, how would you like to be involved? (Multiple choice) (if applicable) Steering group member/ Setting priorities and suggesting projects/ Voting on or discussing projects/ Applying for funding.

4: Ask participants what was different

PB processes are often experienced by citizens as about more than just distributing funding. Many people have had genuinely uplifting experiences through engagement with PB.

It can really add value to an evaluation report to include the voices of the participants. Press releases usually include quotes as a way of 'humanising' the issue under consideration. They can provide richness and context to what could otherwise be a dry report of the facts.

Ask for feedback in a variety of ways and at different points in the process.

You can get feedback through interviews with a select sample of participants, or perhaps through using an online or paper-based survey. You may also try techniques like appreciative inquiry.

There are many times when getting detailed feedback is useful; at the start of your process to establish a 'baseline', at events or meetings, and after the project is complete. You may decide to use a variety of forms and questionnaires for different occasions. If so try to ensure the information being gathered is comparable. Besides individual comments you are also looking to produce information that can help spot patterns, or show if opinions shifted over time.

Try to remain objective and systematic in collecting responses

At a PB event, it is helpful to have a designated 'interviewer', whose job it is to talk to participants about their thoughts or feelings about the PB process in general. It's also useful for them to speak to the same people at both the beginning and towards the end of the event, to see if their perceptions have changed. Material collected via filmed or 'vox-pop' interviews can also be used to supply suitable quotes for later written reports.

Always ask permission before using filmed interviews or pictures within publicly available film or evaluation report. This also applies to attributing specific comments to specific people.



PB events can often become emotional, exciting affairs.

Here are some comments from participants at PB events:

- ✓ 'Tremendous – really, really good. Hope it happens again.'
- ✓ 'People are too ready to complain about how money gets spent – this was really transparent – a good way of doing things'.
- ✓ 'Finding out about others' work – there were a lot of groups I didn't know anything about'.
- ✓ 'Brilliant way of making decisions. Well done.'
- ✓ 'It brought organisations, as well as the community together'.
- ✓ 'Communities learned to think about their own situations and priorities, rather than it being decided for them'.

It's a good idea to have an 'any other comments' box on your event evaluation forms. Participants will often add positive – and negative – comments regarding the process, which help to 'flesh out' their evaluation responses. It's often within the more negative responses that your real learning can occur, so don't just cherry-pick positive comments. **Your evaluation report will be more likely to be trusted if you are seen to be reporting a wide range of viewpoints.**

Participant diaries bring extra richness

A diary is an ongoing record of how people are feeling, or what they did. Some PB projects ask people, either in the community, or as part of the organising group to keep a written or audio diary. They can be an invaluable record of the day-to-day successes and failures of your programme, and a way for people to reflect as they go along.

5: Keep track of the numbers

Without data it is hard to evaluate PB. Data can be qualitative, but most 'professionals' require quantitative evidence. That means being number based.

Quantitative measures surround us. One crucial indicator of the effectiveness of PB as a tool for increasing levels of community engagement is to monitor 'first time attendees'. For example of 100+ attendees at one PB voting event over 50% had never attended a community engagement event before. A man in his sixties had never voted in any election in his life, but took part in the local PB process, because he '*could see some point to it*'.



"The fact is... it's a public voting thing. You have to be there to vote. That's the big message."

(Participant in a PB grant making event)

Monitor participation rates in your PB

Physical attendance at events or online goes a long way to showing you have engaged widely. If you do count who participates, and there are many ways of doing this, it's helpful if you can break this down by neighbourhood or by demographics. Recording their age, gender, ethnicity and so forth. Also don't just record who attended events, but also who submitted applications, who voted online, who participated in planning forums or awareness raising events, and who was successful in securing funding.

However its important people can choose to identify themselves as part of a specific demographic. Don't assume people fall neatly into, or are happy to be counted as belonging to a specific community or category.

Compare participation rates with areas not experiencing PB

Assuming increased participation is one of your primary outcome measures, you should be able to compare your participation rates against a control area not undergoing a PB process. For example, over time you may see other types of participation increase. Such as;

- Voting rates in local elections. Are these higher where you have done PB in relation to communities that experienced it?
- The number of complaints received about services. Counter-intuitively more complaints might simply mean people feel complaining is worthwhile, rather than a failure to provide a good service!
- Volunteering rates, or participation in forums such as Community Councils. Anecdotally, we sometimes hear that areas with PB are more likely to have an election process to join a local community council.

It's also good to know if the projects funded also reached and involved specific groups of people, or perhaps only worked within a specific community.

Count the added value

Ask people if being involved in PB has attracted additional funding, access to shared resources or more volunteers. This can be a powerful way to show that while the money was important, participating in itself brought added value to their work. We often use this phrase to explain how PB can generate additional value:

"The money is the bait, not the fish."

Use nationally collected data sets

Over time or across communities you may be able to demonstrate that resources influenced by PB are starting to show impacts on issues such as attainment in qualifications, health improvement or economic factors.

While these will likely take many years to show, if your PB is going to continue and grow in scale it is important to try and identify these trends.

6: Use films to tell the story

People have said that the atmosphere at PB events has to be experienced to be believed. Feedback is that people only really understand the power (and the point) of a PB exercise through attendance at a live event. It was realised early on that the 'next best thing' to being there was to make a video record of a PB event. In the UK so far, videos have tended to focus on small grant voting events, but it is also possible to 'tell a video story' of how mainstream PB processes are developing.



Image from a PB film produced by Edinburgh City Council

Points to consider if making a video

Videos can be expensive, but where possible using local filmmakers is a good approach. Often third sector partners or local colleges will have media studies departments. Using these allows for more local ownership and identification with the process, as well as potentially saving money!

The filmmaker(s) will need to be briefed and supported to capture the 'spirit' of the event being filmed – to get a good balance of 'talking head' interviews, establishing shots of the room/audience, a shot of a packed venue over lunch with lots of enthusiastic interaction, as well as a record of the presentations. **Quirky footage is helpful in engaging your audience. Include emotional or humorous reactions.**

Be prepared and start early

The 'pre-business' part of the event during signing in or morning coffee can flash by, so it's important to be prepared to get a good spread of interviews before the event starts. People can also be re-interviewed after the voting or

deliberations have taken place. A range of interviewees is helpful – presenters, members of the public, officers, or elected members all add new perspectives. Tailor specific messages to those you want to reach. Politicians, for example, tend to trust other politicians.

Don't leave it to the film-maker

When recording interviews, it's useful to have someone at the event with local knowledge to introduce the film makers to potential interviewees and to ask the questions. Give thought beforehand to the right questions to ask and create ones that don't have simple yes /no answers. Such as:

- ? *What do you think of this event?*
- ? *Is PB a good thing for this community?*
- ? *How are you feeling about presenting?*
- ? *What's the best thing that's happened today?*
- ? *How would you make it even better?*

Review all the footage

Your involvement at the 'editing stage' of the filmmaking can be really helpful. Filmmakers have technical skills but often limited knowledge of the PB subject matter – it's important they understand the story being told. We've seen examples of films of PB events which, at one extreme, have been nothing more than a procession of talking heads. Or at the other end of the spectrum, a statically filmed procession of similar presentations. If you're aware of particularly strong moments or messages, either on the day, or on looking at the raw material, it's important to make sure they are included, and not dropped because, perhaps in the filmmakers' view, the light or sound wasn't 100% perfect!

Keep it short and engaging

With the current state of digital media, and the use of social media, the final product should be tailored depending on the desired audience. For training or evaluation purposes, a 5–10 minute film might be produced, but a 2 minute 'highlights clip' can also be generated from the main material to use as an online taster or for easy awareness-raising.

7: Hold a stakeholder reflection event

This page follows a format developed by the Scottish Community Development Centre (SCDC) for evaluating PB against the 7 Scottish National Standards for Community Engagement.

These are: Inclusion, Support, Planning, Working together, Methods, Communication and Impact.

It is suggested you hold a reflection event after completing your PB programme. Partners involved in planning the PB process should come together to evaluate their efforts against Scotlands National Standards for Community Engagement. After convening a group of key stakeholders and reviewing evidence on your programme you can complete a PB reflection report.



Firstly, in your reflection report describe how the review process was carried out (who was involved, where and when did they meet and the evidence used to judge performance).

Then, on a scale of 1–6, agree a rating against the following 7 questions: (where 1 = unsatisfactory, 2 = weak, 3= satisfactory, 4 = good, 5 = very good and 6 = excellent.).

After scoring each you should include comments to justify your score.

1. **Inclusion:** *How well did we involve the people and organisations that might want to participate in the PB process?* For example, did we involve a wide range of participants whose interest might be affected by the PB budget/process?
2. **Support:** *How good were we at identifying and overcoming any barriers to participation?* For example, were actions

taken to remove any barrier and support people to attend or be part of discussions?

3. **Planning:** *How clear were we about the purpose for the PB process?* For example, was there a clear plan and theme for the funding? Was there enough time and resources to support the process and allow people to be involved?
4. **Working Together:** *How well did we work together to achieve the aims of the PB process?* For example, were roles and responsibilities clear and understood for all those involved in planning the process? Did methods of communication during the process meet the needs of all partners involved in planning the process?
5. **Methods:** *How good was our PB methodology?* For example, did we use a variety of methods e.g. online participation, community pitches, community stalls etc to ensure that there is plenty of opportunities for deliberation? Did we obtain feedback on the method(s) to ensure that we are learning and adapting?
6. **Communication:** *How well did we communicate with the people, organisations and communities involved in the PB process?* For example, was information clear and accessible on the lead up to the process? Did we feedback on their pitch? Did we highlight alternative funding options to those who missed out on funding? Did we tell the wider community who was awarded funding?
7. **Impact:** *How would we rate the immediate impact of the PB process and what has been learned to improve future PB processes?* For example, is the community happy that it was a transparent & democratic process? Has PB improved relationships between community groups? How will we assess the long-term impact?

Finish your reflection by asking yourselves:

- ? *What key lessons have been learned?*
- ? *What next? How will we develop our PB to to maximise the potential of our work?*

More information on Scotland's national standards for community engagement at:

www.gov.scot/Topics/People/engage/NationalStandards

8: Follow what happens next

Once you have funded something it's not the end of the matter. Often it's just the beginning.

Keeping in touch with what happens can be a challenge; especially the people you have funded are not used to reporting back. As with all publicly funded exercises, a PB audit trail will however be required – whether it's a small-scale community project, or a more ambitious budget from a mainstream provider. There are some simple methods you might use to keep track. For example, visit projects if possible. Seeing is believing, and nothing beats actually going out and about and talking to people.



Hard data on spending or delivery can also be supplemented by asking for project progress reports, which provide a tracking mechanism.

Alternatively you might want to hold some sort of end of programme event where you invite people back together to share what they have been doing. And of course you may have another round of funding to give out, which could be a good moment to call people back together.

Keep it simple and relevant

Often community organisations complain that they are being asked to monitor things in ways that don't matter to them, or for reasons they don't understand. Whatever evaluation you decide to do it should be proportionate and useful. PB is about doing things differently, or at least being flexible about how you might do things. If you do require monitoring information, make sure it's done in a timely way. That people always receive thanks for returning information on time, and are clear about what you expect. Do you actually need all those receipts and timesheets back? Or would evidence of activity and impact be more useful?

A feedback report goes a long way

Every PB process is unique and that means every evaluation process will be as well. But most funded programmes require a feedback report that proves the money was used as intended. The kinds of information you might want to capture can be almost endless and include:

- Projects or activities that have happened
- Amount of funding already used
- Additional funding brought in as a result
- Number of people directly benefiting from or involved in projects
- Number of additional volunteers gained
- What would happen without PB funding
- Increased awareness in the community about the PB process used to disburse the money
- Follow on work from PB funded work
- Process improvements for next time
- Increased empowerment – more community activity whether as volunteers, activists, or just general awareness of what's happening locally
- Changes in perception towards PB.

These are just some suggestions. You may have other information that you want or need to collect – in which case you should ensure the questions asked on a questionnaire or in a focus group will provide you with the information you want.

Sadly, the best feedback request in the world is useless if people don't respond or do so in a 'tick-box' way. Take advice on getting good information back, and most importantly limit the time needed to complete it.

Face to face is best

Throughout this guide we have stressed the value in bringing people together and talking face to face. PB is all about building relationships and trust, and that is by nature a collective, social activity. Create as many opportunities for that as you can, and, most importantly, record these encounters.

Always get permission before you share people's personal identifiable information or images. Stick to the rules on data protection.

9: Find and use your critical friends

Your critical friend should not be directly involved in the process itself and they should have some understanding of either your local context or the nature of your PB process.

Our focus has been on self-evaluation.

Self-evaluation can harness your insider knowledge of the process and create ongoing reflections on your work. However, self-evaluation can attract criticism; that it is not independent and therefore not robust evidence. You can address this problem through using a critical friend, or maybe pay for an external audit.

There are a number of different ways of finding a critical friend for your evaluation. Asking a local supporter for contacts, searching the internet, or approaching a local council for voluntary service.

What is a critical friend for?

Their role is to help you consider the process from all angles, ask the questions you haven't thought of, and identify gaps in your evaluation plans. Their job is not just to evaluate your evaluation.

An 'outsider' can however keep you focused on collecting evaluation data at moments when you are understandably focused on the delivery of the process.

External auditors and evaluators

You may, if you have the resources to pay for it, want more than a friend, and decide to ask them to become your external evaluators or auditor. But such work may not come cheap. It's important you verify they are trusted by others to do a good job, especially if you intend to pay them.

A financial auditor is a critical friend who helps 'quantify' your financial value and check you have recorded your accounts properly.

Evaluating a community engagement process is a bit different, and will likely use more 'qualitative' approaches, such as focus groups, one to one interviews and participant diaries.

Your critical friend may ask you

- Have the views of all stakeholders been considered at each stage of the evaluation?
- Do the methods being used suit the particular aims and values of the process?
- Are there possibilities for collecting a wider range of views and input?
- Has data been clearly and fairly represented in your reports?

What to expect from a critical friend? As a minimum, they should:

- Meet or speak with you prior to each evaluation event, such as a planning session, event or focus group session.
- Review the evaluation plan and completed evaluation documents.
- Check for missing stakeholder perspectives and suggest ways for filling gaps in representation and recording different perspectives.
- Comment on the final evaluation report.

They can support the work of the evaluation in the following ways

- Attending the evaluation planning meeting (and perhaps subsequent meetings) to contribute an 'outside' perspective to the evaluation design process.
- Attending and report on some of the events, such as planning meetings or voting events.
- Review collected data and discuss with you how to analyse it, present it and whether there are any gaps that you could follow up.

Whoever you use an external evaluator should bring an extra degree of rigour. They must be experts in a range of methods of community-based evaluation, and ideally have already done many similar pieces of work.

10: Share your learning!

Tell your stakeholders what's changed

A stakeholder is anyone who cares about the work you are doing. They can be someone in the community, or one of your partners. They may be your funders, or elected politicians. They will be the people interested in your evaluation.

Stakeholders will care about different things. Check as early as possible what they want or need to know. For example, if one of your stakeholders is your local health and social care board they will want to see evidence that your PB programme improves health and wellbeing. If they are a local school, they may be more interested in educational attainment. If a politician they will want to know that all sections of the community were engaged.

Always engage with budget-holders

Anyone funding your PB process must be central to your evaluation planning. Double check on their needs, and what they consider good evidence. They are going to be your primary evaluation audience. They need to know how it went. You need to tell them what you have achieved in ways that convinces them their funding was well spent.

Agree your wider audiences

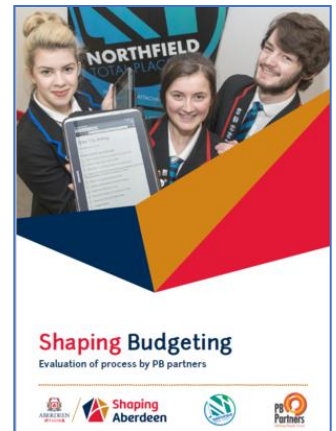
Deciding who your audiences are is a collective process, and involves a thorough conversation about why you will do an evaluation, and what you hope the evaluation will achieve. While your audiences are likely to include your closest stakeholders, there may be other audiences you want to address.

Audiences can be local, national or international. They can be internal to the process (including yourselves) or less involved. They can be already supportive or sceptical. Agree what information each one would be interested in, why, and how they want to receive that information. For example, should you reach them through a film, by posting on social media, or perhaps more directly through reports or at an event?

Report-writing and dissemination

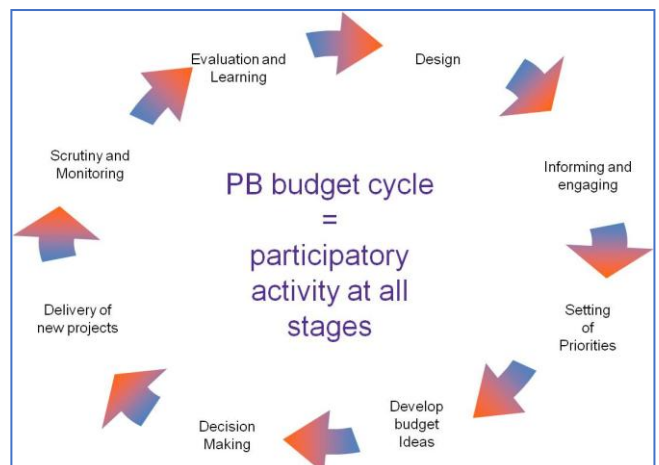
You will need to collect all your evidence together in some form of report, which might contain the analysis, tables and data you have produced.

Ensure it is easy to read. Present quantitative data visually (using graphs, pie charts or 'info-graphics'). Use quotes and comments to illustrate important points from the more qualitative data.



Organise your report so your readers know where to find things that matter to them. Use appendices to present data. Describe how you collected evidence. Focus on your learning, not just the evidence.

Share a first draft of the report with the evaluation team or critical friends. Share a second draft with key stakeholders if you can. Their comments should give you confidence that the picture you have produced of the process is a fair and accurate one.



Make sure that your learning feeds back into future process planning. Evaluation is an essential part of the PB process, and should involve everyone.

Conclusion

The aim of this guide has been to provide ideas and examples of possible practical ways forward for community-led organisations, local authorities and partner bodies interested in evaluating grant-making and mainstream PB processes.

To be impactful PB needs to scale-up

Grant-making PB should be seen as a starting point to the evaluation of PB programmes, appropriate to the needs and aspirations of those involved.

It is hoped that, with relevant input from committed leaders and stakeholders it is possible to do PB at scale.

When evaluating your PB at scale it is essential to:

- **Involve residents from the outset.** They should have a role to play in the design and delivery of the evaluation process.

For that they need access to resources, which is why you must:

- **Get buy-in from finance managers and heads of service;** who can release the staff needed to deliver and evaluate PB as well as the resources for the public to decide upon.

But that is only possible if there is:

- **Sufficient and sustained political will.** The support of elected members is crucial. Having their support makes it more likely PB will continue long enough for the impact to show.

Meaningful engagement is hard work

With those ingredients in place, and with imagination and commitment it will be possible to develop vibrant, viable and sustainable mainstream PB programmes long into the future. And to know that have had the intended impacts. PB is about community empowerment, which is a heightened form of more traditional engagement. Empowerment implies a shift in power and influence, and that is naturally challenging to those already holding power.

Done well PB should bring benefits at all levels of public engagement, but it should always aspire

When is it PB? And when is it not?

International learning on PB has continually recognised that it is very context specific. That is, every situation where it occurs is unique, depending on the underlying institutional and political situation within which it happens. As a result there is no one universally accepted definition of PB. Nor always agreement that a specific process can be called PB or not.

Reflecting on seeing many experiences Tiago Peixoto, internal expert on participatory governance at the World Bank identified:

7 defining characteristics of PB:

- Directing public budgets is the primary focus of the process.
- Citizen participation has a direct impact on the budget.
- Citizens have the opportunity to decide on the rules governing the process.
- The process has a deliberative element.
- The process seeks to redistribute resources on the basis of greatest need.
- The process is designed to ensure that citizens can monitor public spending.
- The process is repeated periodically.

Read the blog by Tiago Peixoto at:

<https://democracyspot.net/2012/09/12/participatory-budgeting-seven-defining-characteristics/>

towards deepening citizen led decision making. Progressively, at scale and, indeed, whenever taxpayer's money is being spent.

If successful PB can reinvigorate our democracy by involving ordinary people in the tough decisions being undertaken by public bodies. They are responsible for billions of pounds of taxpayer money. Their decisions impact on the lives of all citizens, and particularly the most deprived and marginalised.

Without learning from a good evaluation it is unlikely the high ambitions for PB in the UK, or elsewhere will be achieved.



Appendix 1: Some other approaches

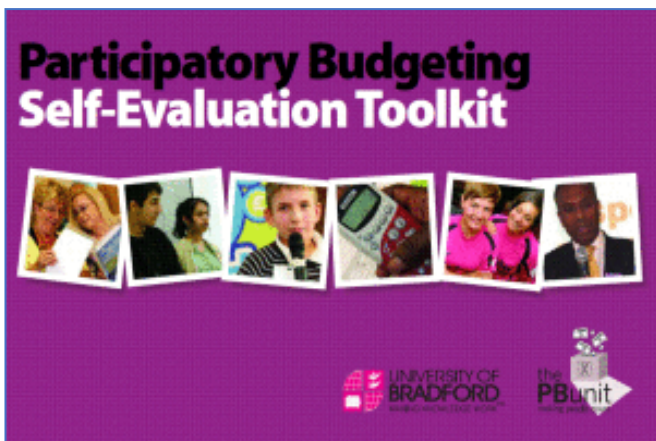
Case Study Template

Shared Future have a standardised template for producing case studies of PB processes. These attempt to provide high level reviews useful for sharing learning, based on describing the “what, when, where, why, who and how” of an individual PB process. **Please contact us for a copy of the template.**

SQW evaluation of PB in England:

The Department for Communities and Local Government asked SQW, a respected external evaluator write a report of the PB programme that ran in England between 2008 and 2012. It took a cost/benefit approach from an external perspective. In our view, whilst thorough, its reliance on quantitative data, a huge number of very different cases, and an underdeveloped model of PB in the UK at the time, meant it struggled to provide useful learning. **A copy is available on request.**

The PB Unit Self Evaluation guide:



Academically informed and well designed, with a wide range of templates and supporting materials focussing on capturing better qualitative and quantitative evidence. Much of this guide is based upon its ideas of self-evaluated PB. Well worth a look if you are considering a rigorous and detailed evaluation. **A copy is available on request.**

WhatWorksScotland's reviews

What Works Scotland was an initiative to improve the way local areas in Scotland use evidence to make decisions about public service

development and reform. It worked with Scottish Community Planning Partnerships involved in the design and delivery of public services to:

- learn what is working in their area
- encourage collaborative learning by a range of local authority, business, public sector and community partners
- better understand what effective policy interventions and effective services look like
- promote the use of evidence in planning and service delivery
- help organisations find skills and knowledge they need to use and interpret evidence
- create case studies for wider sharing and sustainability

See more at: <http://whatworksscotland.ac.uk/>



Public Agenda's 15 key metrics for PB;

The USA based Public Agenda organisation produced a very useful set of key metrics for evaluating PB processes. They cover:

Impact on Civic and Political Life: *Does PB engage a significant and growing number of residents, including those who cannot or do not participate in mainstream political life? Does PB foster collaboration between civil society organizations and government? Is PB associated with elected officials' political careers?*

Impact on Inclusion and Equity: *Is PB engaging traditionally marginalized communities? Does PB facilitate participation? Is PB fostering equitable distribution of resources?*

Impact on Government: *Number of PB processes and amounts allocated to PB changing from year to year? Implementation rate of winning PB projects. Are additional resources being allocated to projects or needs identified through PB? Cost to government of implementing PB?*

See: <https://www.participatorybudgeting.org/15-key-metrics-for-evaluating-pb/>

Appendix 2: Find information on PB

More information is always available if you need it. Just search for it or ask!

The **Shared Future website** contains resources about PB, including free toolkits, videos or news of how PB is growing in the UK and worldwide: You are encouraged to send reports of projects to us, so others can learn from what you did: sharedfuturecic.org.uk/participatory-budgeting/

The **PB Scotland website** provides information about Community Choices events, policy and resources in Scotland, with examples, pictures and videos of Community Choices in action: <http://pbscotland.scot>

Participedia is an international repository of research into participatory democracy. Consider sending in your evaluation to add to their data: <https://participedia.net/>

Evaluation Support Scotland provides resources, guides and training in conducting evaluation: <https://evaluationsupportscotland.org.uk/>

Connecting through social media

To find out more about PB or to ask any questions about PB you can use online forums.

On LinkedIn:

Follow us at: [shared-future-cic/](https://www.linkedin.com/company/shared-future-cic/)

On X (Twitter):

Follow us at: [@SharedFutureCic](https://twitter.com/SharedFutureCic).

The internationally recognised PB hashtag is: #participatorybudgeting

Or why not set up your own local social media based PB group to engage with your community?

Always remember the value of learning exchanges and study trips.

Read our 2023 report on evaluating the wellbeing impacts of PB

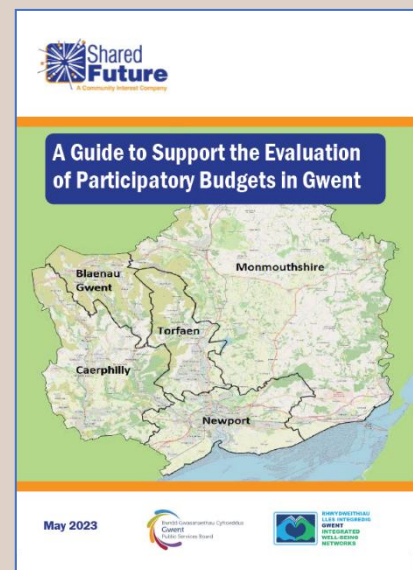
Report and toolkit for the Evaluation of Participatory Budgets in Gwent

This report reflects upon recent experiences of PB within the Gwent area of Wales, from early 2020 to January 2023. Produced using qualitative research approaches, it focusses primarily on identifying measures for the wellbeing impacts of PB.

It contains overviews of the different processes delivered across Gwent, based on reviewing written reports, undertaking interviews with those leading the processes, engagement with members of the Integrated Wellbeing Network (IWN) that supported PB in Gwent, and with community members and groups involved, as bidders or voters, or in other ways.

It also contains a 'toolbox'. That is, a number of guides or templates to adopt or adapt as appropriate, as well as extensive references to further information. This toolkit is intentionally written to be a resource for those leading PB processes, rather than a detailed comparative analysis.

Find this resource at this link: <https://sharedfuturecic.org.uk/reports/report-and-toolkit-on-the-evaluation-of-participatory-budgets-in-gwent/>



Appendix 3: Common terms

Common terms used in evaluation.

Aims: What you hope the project will achieve in an overarching more general sense that may not be easily quantifiable or measurable. For example, an aim would be to empower people.

Appreciative Inquiry: A deep dive story-telling and research technique. It focuses on identifying and amplifying what is working well, rather than dwelling on problems or weaknesses.

Audit: an independent, objective quality assurance activity designed to add value and improve an organisation's operations by bringing a systematic, disciplined approach to assess and improve. Internal auditing is conducted by a unit reporting to management, while external auditing is conducted by an independent organisation.

Baseline: the status of services and outcome-related measures such as knowledge, attitudes, norms, behaviours, and conditions before an intervention, against which progress can be assessed or comparisons made.

Cycle: In this case it means each round or session of participatory budgeting. This may be a repeated process in the same area, linked processes in different areas or a different process model but in the same area.

Indicators: a quantitative or qualitative variable that provides a valid and reliable way to measure achievement, assess performance, or reflect changes connected to an intervention.

Measures and targets: How you identify whether or not you have achieved your objectives. Targets and measures are specific and preferably quantifiable in some way. These should be scaled according to the size of the project. For example, for the objective example you could set a target of 50% of a community feeling able to influence decisions and 10% participating, and measure this through a community survey and attendance at voting events or within the wider process.

Monitoring: Routine tracking and reporting of priority information about a program or project, such as its inputs and intended outputs, outcomes and impacts.

Objectives: What you hope the project will achieve in more specific terms than outcomes. Objectives should ideally be measurable. If objectives are met then an aim might be considered achieved.

Objectives should be scaled to the size of the project. For instance, if you are allocating £20,000 by PB in a grants pot process, it's unlikely you'll achieve significant changes to service provision. But you may increase levels of volunteering or increase awareness. For example, an objective within the aim example above would be potential participants regularly participate in influencing local decisions.

Outcomes: The changes or differences you expect your project to make. They include differences in people's knowledge, understanding or behaviour. Using the example above in 'Aims', an outcome might be that people feel that they can take action, based on their sense of being more empowered.

Outputs: These are measurable actions, products or events that occurred during or as a result of your process. For example specific funding going to specific groups, a new toolkit being written, or numbers of people participating in training sessions.

Qualitative: information collected using methods, such as interviews, focus groups or observation, which can provide an understanding of social situations and interaction, as well as people's values, perceptions, motivations, and reactions.

Quantitative: Information measured on a numerical scale, which can be analysed using statistical methods, and can be displayed using tables, charts, histograms and graphs.

Vision: This is your long-term aspiration for the project. The best way to answer it is to say "what do I want the area or community to look like in 10 years' time". A vision is usually larger than the project itself but an aspiration that the project will contribute to achieving the vision. For example, a vision would be a stronger and more resilient community able to manage and react to change.

Appendix 4: Impact evaluation and PB

This section has been written by Michael Touchton of the University of Miami. A leading international researcher on the effectiveness of PB, his paper, "Improving Social Well-Being through New Democratic Institutions," co-authored with Brian Wampler, was selected winner of the LAPIS 2013 Best Paper Award.

What is Impact Evaluation?

Impact Evaluation (IE) assesses if policy solutions work and why. Specifically, IE shows whether and how policy interventions impact people and communities by comparing impact indicators over time for the same populations and across space relative to other populations.

Why is IE important?

IE is a rigorous analysis of cost/benefit trade-offs across projects, including those surrounding different programs designed to meet similar goals, as well as variations in program design for the same type of policy. IE shifts the policy design logic from one where experts "*already know what's best*", to one where experts "*can learn what's best in this context, and adapt to new knowledge as needed*".

How IE Works

IEs focus on separating a policy impact from all other factors that could have made simultaneous impacts (these are known as 'confounding effects') and present problems for drawing conclusions from data. The aim is to know that it was the policy that impacted a population, rather than other trends to which they are exposed.

IE allows evaluators determine what would have happened to the population in the absence of the policy intervention. This is as you cannot institute a policy, measure impact indicators, and then travel back in time to measure the same indicators for the same population without it having experienced the policy.

Instead, one needs to create a comparison population that is as identical, on as many dimensions as possible to those experiencing the policy intervention, except for the fact that they

do not experience the policy intervention. Robust IE compares experiences of a 'treatment group', receiving the intervention, with a very similar control group.

Steps to perform Impact Evaluations

- 1. The Pre-test:** IE demands baseline data collection before program implementation begins and optimally even before the program is announced to avoid any program-based contamination of the baseline data. This represents the "pre-test", before the policy treatment is administered. Options include considering: effectiveness, efficiency, equity, fairness, voice, etc. It is important to remember that these values may conflict; some policies may increase economic equality, assuming they are effective, but are they perceived to be fair?
- 2. The Treatment:** Implementing the policy treatment through a randomised, controlled trial (RCT) represents the highest standard of IE design. Here, populations are randomly assigned into treatment and control groups. The main advantage of this design is that randomisation greatly diminishes the probability that any observed impacts are due to selection bias of the population receiving the treatment.
- 3. The Post-test:** Evaluators collect impact indicators following the treatment for both treatment and control groups. Any changes can then be compared across the two groups to draw conclusions (e.g. did anything change across groups? Did the treatment group change more than the control group? Or less? Are these differences statistically significant?).

Other aspects of Impact Evaluation

It is important for evaluators to monitor implementation to help understand the results of evaluation as well as to properly time the post-test. Unintended impacts are common and evaluators should watch for these, as they often represent unexplored evaluation opportunities. Finally, there are other analytic options designed to approximate RCTs if randomization is not feasible. These include matching strategies, difference-in-difference estimation and regression discontinuity design.

Appendix 5: Evaluation and digital PB



Online PB enables people to participate at home, in the workplace, or anywhere else they prefer. Support may be needed.

Going online brings opportunities for evaluation, especially in promotion, the collection of data and getting feedback from participants. The following advice has been produced by the Democratic Society, experts in supporting digital (online) democracy.

Evaluating online PB is done much in the same way as evaluating your offline process! This is because online and offline processes should always be integrated fully – neither is distinct from the other.

Below are ideas for evaluating PB process specific to digital tools.

What to consider when going online

Ideas below relates directly to the 10 actions used in this guide. Often the advice is simply the same. When there's a digital component to your PB, and there should be some online aspect, if only in your communications, here's what to consider:

1: Agreeing outcomes before you start: What do you hope to achieve by adding a digital aspect to PB? Examples of outcomes related to digital engagement:

- *More ways for people to participate, or options for people to participate at a time that suits them*
- *Engaging new demographics*

- *Engaging more people in the PB process*
- *Raising awareness of the PB process*

2: Establishing your baseline: What will adding a digital aspect to your PB process achieve? Baselines for comparison related to digital engagement could include comparing:

- *How many ideas you hope to generate, how many people you hope will submit ideas, register interest or eventually vote*
- *Number of ideas or applications generated for your current PB process vs. past processes*
- *Number of people participating in PB project (online and offline) compared to past PB processes or other engagement exercises.*

3: Gathering feedback. Example questions specifically related to digital engagement could include:

- *What promotional activities did you undertake in relation to your digital engagement?*
- *What benefits have you observed from using digital engagement?*
- *Have you had any issues with participating? Was there anything you were stuck on?*
- *Any other observations or comments you would like to share about participating online?*

Responses can help improve processes in the future. Don't forget to ask key partners about the set-up and implementation of your digital engagement tool.

4: Asking participants what they felt. Digital engagement provides an additional opportunity to gather feedback from participants. You could gather this by embedding a link, or redirecting them to an evaluation survey as soon as online participation is complete.

Alternatively, you can gather email addresses from participants when they register to participate, and then send evaluation questions once the PB process has concluded. Use online tools such as Survey Monkey or Typeform to collect online feedback.



Promoting multiple ways to connect to an online PB portal enables even more opportunities for participation.

Survey questions for citizen feedback may include:

1. Did you use the website? (always add a link)
2. What was good about using this website? What was not so good?
3. Agree or disagree with the following statements?
 - a) The website was easy to use
 - b) The website made it possible for me to participate at a time that suited me
 - c) Online voting is a good way to take part
 - d) I'd consider using a website like this again.
4. Your suggestions to help us improve the website.
5. Is there anything else you'd like to tell us about using the website?

Open text questions bring opportunities to gain insight into citizen's experiences in their own words.

5: Keeping track of the numbers. Digital engagement can tell you:

- Number of ideas submitted
- Number of individuals submitting ideas
- Number of people registered to website
- Number of comments submitted
- Number of votes cast
- Number of individual visits to the website.

You can also collect quantitative data by using 'Google analytics' or similar online tracking tools. Such as the number of site visits, where people are visiting the site from or when they are participating (e.g. spikes in activity after promotion on social media or an event).

6: Using films to tell the story. Incorporate learning from online experience into any videos. You could post videos on to your digital platform, with a summary or explanatory video. You could post and share the video of previous processes. You could also use videos to present ideas on the site itself upon which people can make comments or vote.

7: Holding a stakeholder reflection event. Do evaluation sessions with your staff team and community members specifically on your use of online tools. Prepare a report of your key findings, and feed back to elected members if applicable. In an evaluation session ask the following questions:

Outreach and engagement

What went well? What were the challenges? (of both online + offline). What methods to encourage voting worked? Did you engage new individuals or groups?

Project process and resources

What went well, and what were the challenges? Have you identified any skills or resource gaps in carrying out the project? How was using a digital tool as part of the process? Would having an online steering group have helped? How was the security and verification process? What's been the direct impact on the area?

Digital tools. *Reflect on the website with regard to: Ease of use, display & layout, clear information and security. Was it a good way to make decisions? Was it a convenient way to involve people? Would you use it again?*

Anything else? What would you do differently next time? Any advice to someone about to start such a project? Did you think it was a valuable exercise? Is it something you would like to do again?

8: Follow what happens next. Digital tools can be helpful in a PB process as the site acts a visible and accessible repository for all ideas, information about your PB process, application

forms, rules, documentation etc. People can access all the information from one place online, at any time.

You can put results on the site afterwards so people know what has happened because of their input – and you can keep in contact to build a relationship with participants by emailing them the results, or you could then send further related information to participants using their email addresses, provided you have made it clear upon registration you may do so.

You can use the site to raise awareness of your process and promote and encourage people to participate; shout about your PB process on social media by linking people to ideas on the site. For example, you could use the results (i.e. the opening of a new playpark) to advertise the next round of PB.

The advice for finding and using critical friends, and Sharing your learning! is identical for both an online and offline PB process.

Online and Offline is not either/or!

Online participation adds value to offline processes and should not replace it altogether, even if there may seem to be cost or other benefits from doing so. In Scotland, online PB is being recommended only when it is integrated fully with the offline process. Constant updating should also be taken into account, as digital engagement and democratic innovation is rapidly developing. The many digital tools used for PB in Scotland are under constant review and can be changed based on users feedback.

For more advice and support

Contact DemSoc at: <http://www.demsoc.org/>

Appendix 6: Values for Quality PB

PB is most effective when underpinned by a set of quality assurance principles

These should be reviewed and agreed by your steering or design group, as they can help with evaluation, or keep a project 'on track'. For example, it's also worth making sure the engagement work you do is informed by external principles such as Scotland's National Standards for Community Engagement. Information on these Scottish principles is available at <http://www.voicescotland.org.uk>

In 2024 Shared Future also updated the long existing UK Values, Principles and Standards for PB.

These are:

Local Ownership



Citizens should be involved in setting budget priorities, identifying unmet needs, proposing projects for public spending and making decisions concerning their community or place.

Scale



PB processes should move towards decisions over increasingly larger service budgets and investments (as opposed to only small-scale participatory grant making).

Shared Responsibility



PB is an effective way to build co-production, common purpose and a shared commitment from all stakeholders when there are clear roles, agreed aims and ways for everyone to become involved.

Support for Democracy



Participation, such as through PB, supports and strengthens representative democracy. Public bodies should advocate for a wide range of approaches for public participation within an ecosystem of local democracy.

Deliberation



PB processes should take citizens beyond personal choice and involve real, informed and meaningful deliberation around budget decisions.

Accessibility



Participants must have good and clear access to PB processes. This includes accessible venues, good information and support to participate.

Transparency



PB processes are designed to give citizens full and clear knowledge of public budgets in their area, even those over which they do not have a direct say.

Our full 2024 PB Values, Principles and Standards are available at:

<https://sharedfuturecic.org.uk/values-principles-standards-for-pb/>

Whatever values you decide best underpin your PB project, they should be simple to understand, using language that is meaningful for those involved in your process.

About this Update

Hear the Voice, Make the Change

This publication was originally produced in 2017, at time in Scotland when many local authorities were considering how to scale up PB as part of the Scottish Governments Community Choices programme.

In July 2025 it has been updated by Jez Hall to fix broken links, add refreshed content and reflect Shared Future's current branding.

It aims to support public sector and community led-organisations wishing to develop their evaluation of Participatory Budgeting (PB).

It is relevant to any organisation working in the UK with an interest in furthering democratic engagement at scale.

It complements our guides to Participatory Budgeting grant-making and other resources on our website.

Our track record

We've been building on learning about PB since 2000, when Jez Hall, a founding director of SFCIC took part in the first UK learning exchange to Porto Alegre.

In 2004 the first Green PB took place in the UK, in Bradford, to make that city 'clean, green and safe'.

In 2008 the Department of Communities and Local Government promoted the first PB national strategy in England. When that initiative ended Shared Future hosted the UK PB Network, which formed to retain the knowledge and build a legacy from that early PB work.

Subsequently the Scottish Government promoted PB under its Community Choices Programme, during which we trained every local authority in Scotland on how to deliver PB. Shared Future have also supported PB initiatives in Northern Ireland and Wales, as well as internationally.

This guide includes ideas and examples from many of these initiatives, as well as some more recent experiences in Scotland and elsewhere.

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All web references checked July 2025.

Hear the Voice, Make the Change

10 ways to record and evaluate your
Participatory Budgeting project.

This briefing has been produced to inform community
organisations, public bodies, elected members
and anyone who wish to learn from or run a
Participatory Budgeting initiative.

