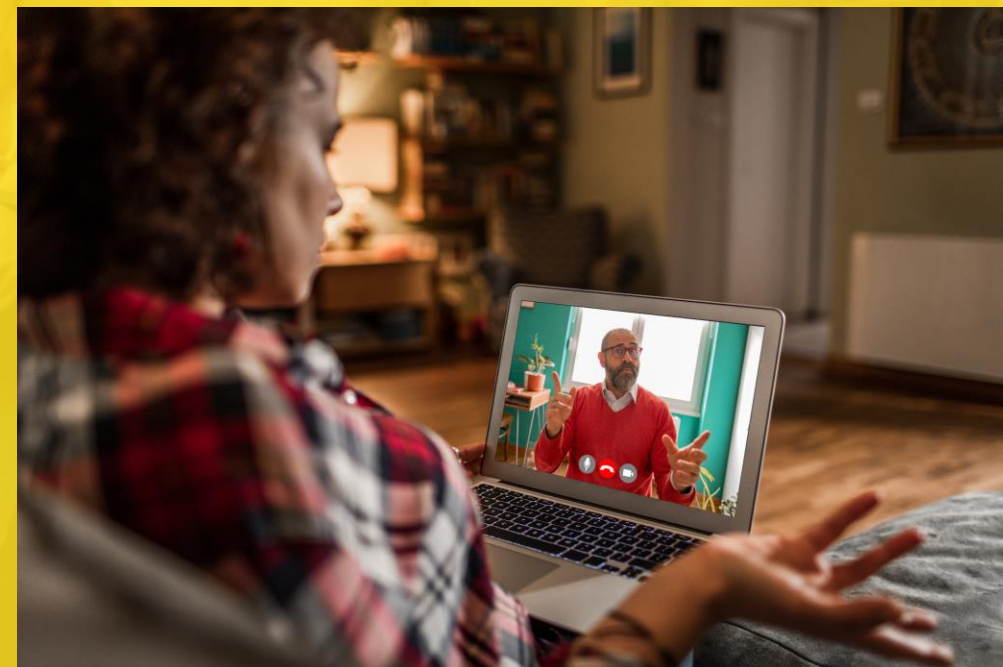


# Running an event (in-person & online)



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DEMOTEC training programme

# Participatory budgeting

**Participatory Budgeting (PB) is a democratic way for people to have a direct say on how a budget or public money is spent.**

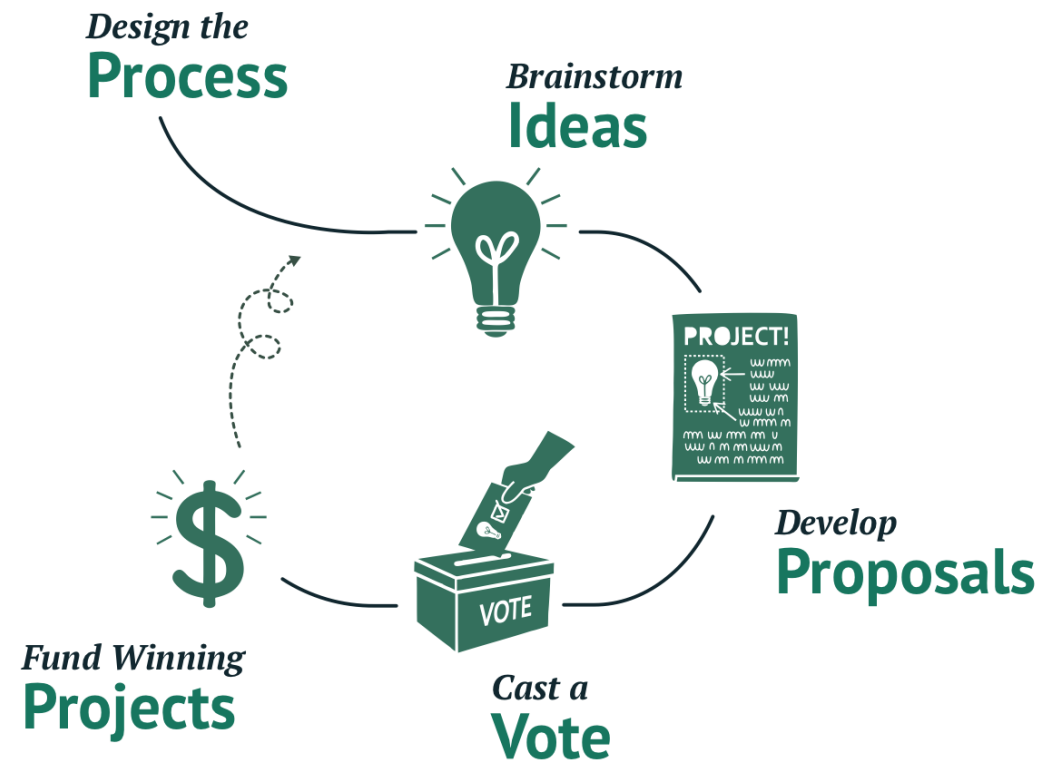


Image Credit ParticipatoryBudgeting.org

# Participatory budgeting: design the process

Steps of a PB process:

1. Design the process:
  - Design & inclusion accessibility
  - Communication & recruitment
2. Idea generation
3. Screening Proposals/ reduction
4. Voting or consensus
5. Implementation

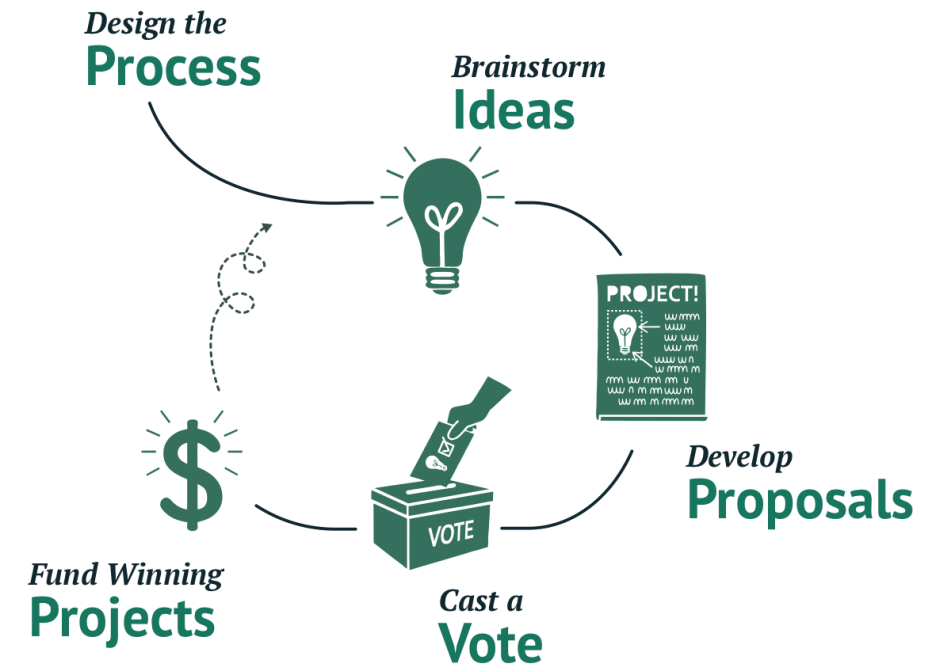


Image Credit ParticipatoryBudgeting.org

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# Participatory budgeting: design the process

## Design includes all the decisions you will need to make in order to deliver an effective PB process.

Design can include reviewing the scope of the PB and any duties in relation to:

- Setting goals, theme, target groups
- Budget, funding, team, resources, tools
- Scale, co-design, area
- Setting criteria, who is eligible to participate
- Type of idea generation (method), type of voting
- Length of the process
- Making the process more innovative or building upon what is already being done.



# Participatory budgeting: design the process

## Timeline

### 3-4 months ahead of event:

- ☐ Establish your PB event goals and objectives.
- ☐ Select your PB event's date.
- ☐ Develop an PB event masterplan venue, costs, catering, fees (travel, speakers, compensation)

### 2 months ahead:

- ☐ Create an PB event budget.
- ☐ Brand your PB event and begin publicity and recruitment.
- ☐ Arrange your Team: facilitators and PB speakers.
- ☐ Coordinate with PB event suppliers (catering, equipment, etc).

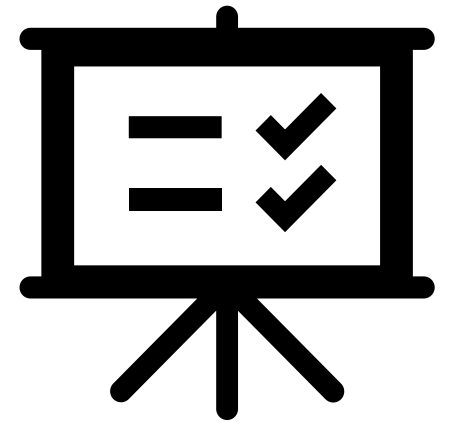
### 1 month ahead:

- ☐ Briefing for team.
- ☐ Continue recruitment and share info with those registered.

# Participatory budgeting: design the process

## Event Planning Checklist

- ☐ Establish your PB event design, goals and objectives.
- ☐ Select your PB event's date.
- ☐ Develop an PB event master plan: venue, costs, catering, fees (travel, speakers, compensation)
- ☐ Create an PB event budget.
- ☐ Brand your PB event and begin publicity & recruitment.
- ☐ Arrange your Team: facilitators and PB speakers, create script.
- ☐ Coordinate with PB event suppliers (catering, equipment, etc).
- ☐ Briefing for team.
- ☐ Manage PB event day set up and execution.
- ☐ Conduct a thorough PB evaluation of your event & send out thank you messages + post-event publicity.





# Participatory budgeting: design the process

## Costs

Some costs you might need to consider are:

- Room rental
- Food and beverages
- Equipment
- Compensation or vouchers for participants
- Speaker fees
- Travel for staff
- Insurance



# Participatory budgeting: design the process

## Design process & briefing team

- Develop program and Facilitation plan (objectives and method)
- Create draft event script (e.g., lead facilitator, speaker introductions, thanks, closing, etc.)
- Organize facilitator briefing to go through the script

Time schedule - in local time (GMT)

Start	End	Time in minutes	Session	Purpose	Details	Materials
13:30	13:45	15	Facilitators briefing	To check tech and connection, update last minute changes	<b>All facilitators to attend.</b> <b>Tech team</b> to make facilitators co-hosts	Facilitation script
13:45	14:00	15	Registration		Participants log on to the meeting. They will be held in the waiting lobby on Zoom to be admitted just before the start of the meeting.  <b>TECH TEAM</b> admits people into the room. <b>Lead facilitator</b> <u>speaking local</u> language to assist the tech team. They communicate through Slack backchannel. <b>Ask people to change their names into first and last name, so tech team can make break-out rooms based on this.</b>  <b>Lead facilitator</b> to ask people: How are you? What are you drinking? (or any other question which is appropriate)	Participants list
14:00	14:15	15	Official opening and tech guidance	To welcome participants, get them familiar and comfortable with the virtual working space and	<b>Lead facilitator</b> to: <ul style="list-style-type: none"> <li>• Welcome everybody in the room and thank them for taking time to take part in our project</li> <li>• Present plan for the session - how we will be working today</li> <li>• Introduce people in the room (organizers and facilitators)</li> <li>• Give a quick demonstration of Zoom <b>functions</b> <ul style="list-style-type: none"> <li>- how to mute/unmute</li> </ul> </li> </ul>	On Jamboard: <ul style="list-style-type: none"> <li>- Event agenda</li> <li>- Conversation guidelines</li> </ul>



**“Inclusive design doesn’t mean you’re designing one thing for all people. You’re designing a diversity of ways to participate, so that everyone has a sense of belonging.”** Inclusive Design leader Susan Goltsman



## Social Inclusion – Everyone Benefits

- In the introduction to her 2018 book '**Mismatch: how inclusion shapes design**', Kat Holmes declares that “designing for inclusion starts with recognising exclusion”. The textbook definition of inclusive design is design for the full range of human diversity.
- Our cities, buildings, products, technologies are touchpoints for accessing the world around us. **When a mismatch occurs between our needs and the manner in which these touchpoints are designed, we experience frustration, or, worse yet, exclusion.**

### Mismatch

How Inclusion Shapes Design

Kat Holmes

foreword by John Maeda



DESIGN, TECHNOLOGY, BUSINESS, LIFE

# Design & inclusion accessibility

**Design includes all the decisions you will need to make in order to deliver an effective PB process.**

With any design, inclusion and accessibility must be considered from the outset, in order to make sure you are not excluding people from the process.



In the 21st century, **access to technology** is a human rights issue, the lack of which precludes people from fully participating in society. This point is particularly relevant to those with disabilities, who are already a vulnerable group with very limited access to resources.

# Design & inclusion accessibility

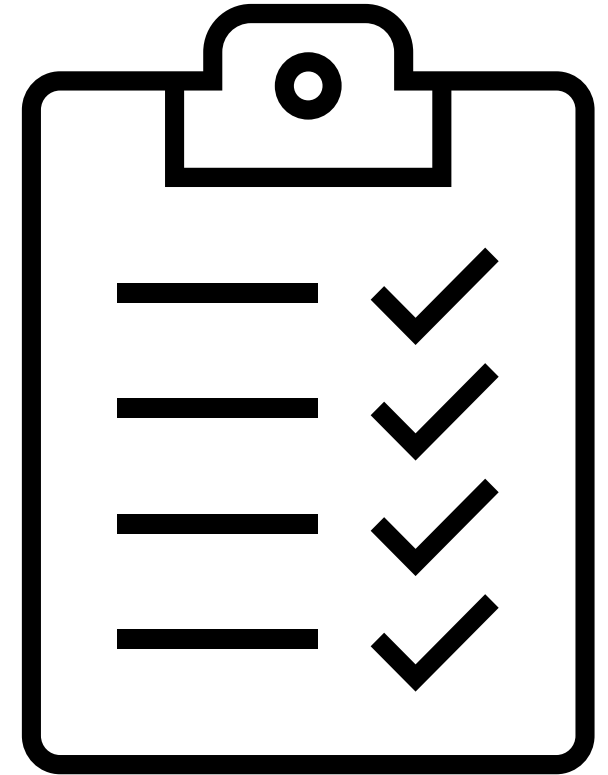
## Some facts and figures

- **Only one in three disabilities is visible.** If you're only designing for people who are blind or mobility impaired, you're missing out on two-thirds of the population who may have anxiety, or who may have different ways of learning.
- **Global trend of an ageing population.** For example, by 2050, over 50% of the UK population will be over 50. As people get older, they might not necessarily be identified as disabled, but their needs will change over time by fading eyesight or hearing, for example.
- We need inclusive design not only for those with disabilities, but also for those who may be experiencing **temporary hindrances**. Everyone has different needs and abilities and these change throughout our lives and sometimes throughout the day, as well depending on the activities we are undertaking.



## Inclusive events principles:

- Reaching out and inviting **under-represented** groups
- Offer digital **support**
- **Compensation** / voucher
- Have a **sign language** translator or transcription for people with a hearing impairment
- Have a break-out or **quiet room** at every event
- Make your event **interactive**
- **Do more work** with marginalised and excluded groups
- Provide information in a **timely manner**; participants get enough time to read and process the content.
- Organize the event on a **time of day** which is convenient for most citizens (i.e. evenings or weekends)





## Inclusive design for digital events

- Audio options (voiceover, podcast)
- Video options – 'how to ...'
- Braille
- Digital flexibility - Walk in the user's shoes
- Use digital assistance tools (i.e. text to speech or transcription tool: Happyscribe, Sonix, otter.ai)
- Have options/choices embedded for diverse needs





# Design & inclusion accessibility

## Inclusive language - speaking

- Language is **fluid**
- Put **people first**, not their characteristic (gender, sexual orientation, religion, racial group)
- Use **universal** phrases
- Recognize the impact of mental health language
- Use **gender neutral** language, no 'guys'
- **Ask** if you aren't sure



## Inclusive language

- **Language barriers** can prevent people from participating in your event.
- Up to 10% of the population may have **dyslexia**, 4% of them with severe cases.
- Dyslexia is not an obvious difficulty; it is hidden. As a result, dyslexic people have to overcome numerous barriers to make a full contribution to society.
- Important to know that each individual is completely unique with how they **learn and process information**.



## Inclusive language – writing texts tips

- **Font & Size** – Arial/Verdana/Calibri, min 12-14 pt
- **Colour & Paper** – coloured paper, no light tekst on dark background, no shine through
- **Presentation** – short texts, wide margins, clear headings, 1,5 line spacing, use bold, underline, boxes, bullet points and numbers, flow charts
- **Writing style/ tone of voice** - like talking to reader, short sentences (15-20 words), avoid jargon, check if possible, NL: <https://www.ishetb1.nl/>, UK: <https://www.plainenglish.co.uk/files/howto.pdf>
- **Posters, leaflets & graphics** – simple, concise, essentials grouped together, use pictures or images, ask a graphic designer





# Recruitment

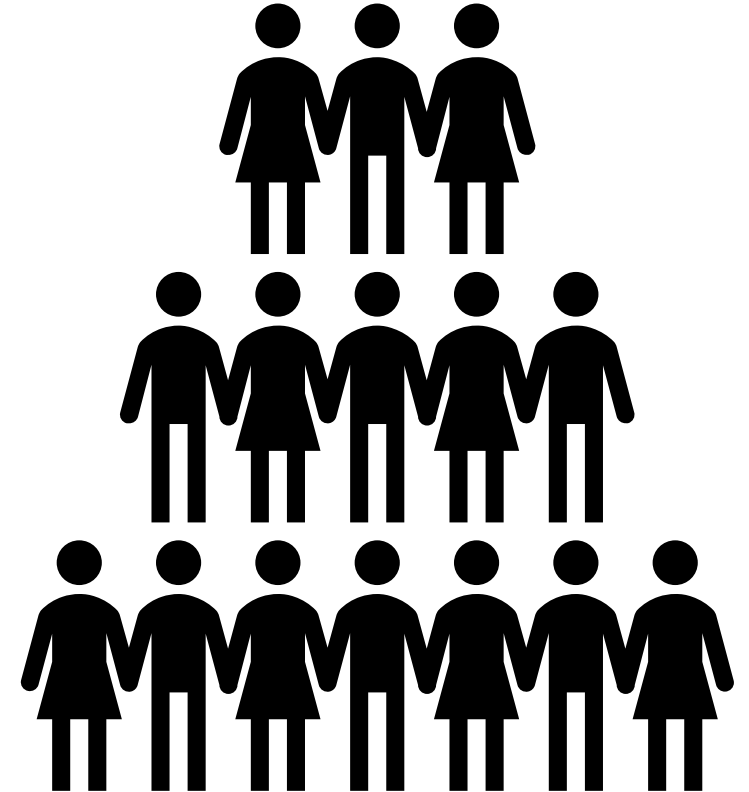


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## Principles for recruitment

- **Timeframe** – start on time! (see timeline)
- Have the right **resources** in place (team, tools, venue, accessibility cost)
- Create a **network map** (more on this is workshop on stakeholder mapping)
- Have a dedicated **communication plan** in place



## Principles for engaging people

- **Think of 'framing'** - It is important to think about how you will communicate with people on what the PB process is, why it is meaningful and why they should get involved; give purpose.
- **Make sure to engage and involve** - This includes considering how you will recruit people and make it easy for people to get involved; for example, you may want to consider a steering group.
- **Make it meaningful** - Invite experts or if useful to engage political representatives into the process and give them a clear role.





## Recruitment approaches

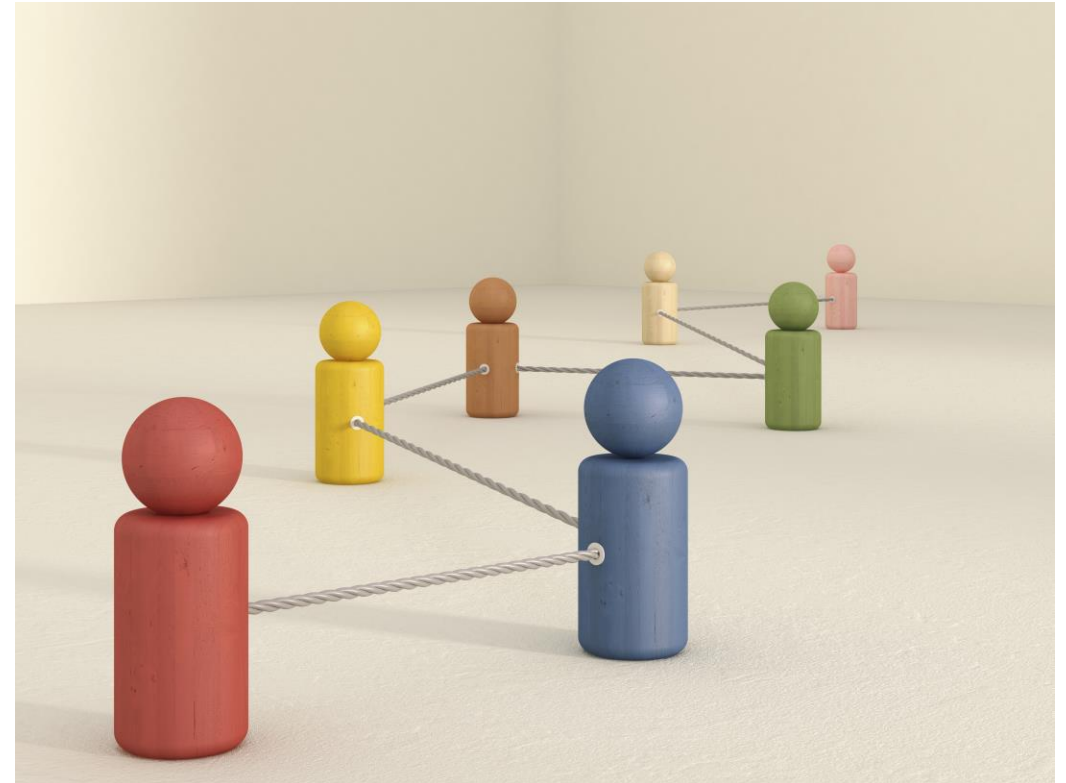
- Network-based methods
- Sortition methods
- Communication approaches
- Targeted groups & Recruiting for diversity



# Recruitment approaches

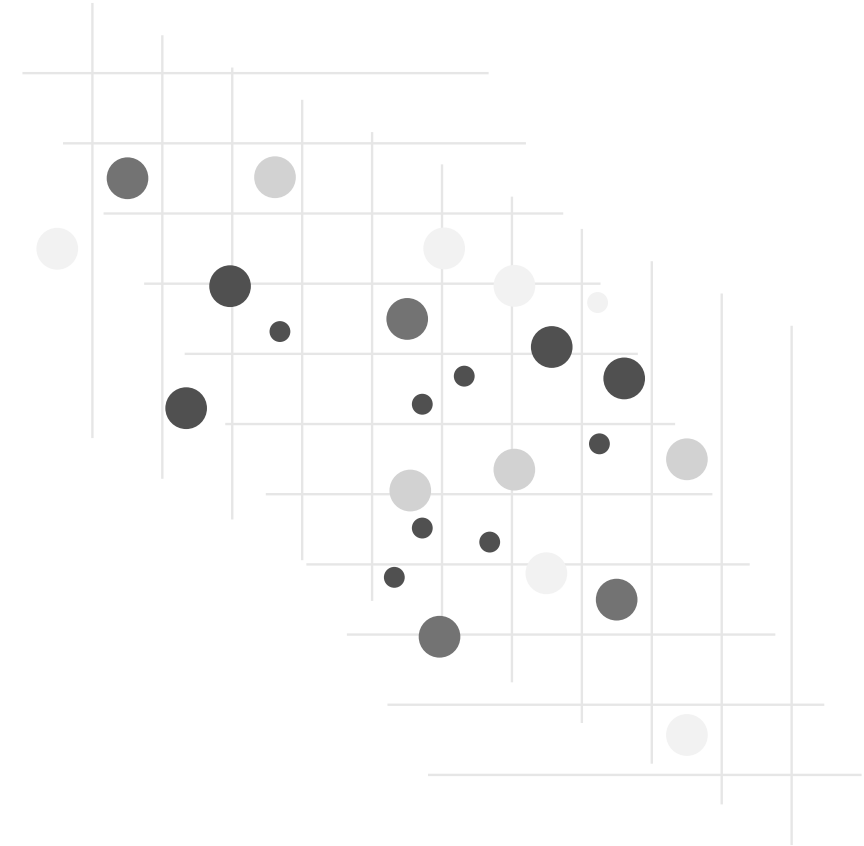
## Network-based methods

- activate existing networks
- reach out to organizations for support
- involve trusted community ambassadors
- highly dependent on time investment
- possible with low budget



## Sortition

- random selection for representative sample
- representative of demographics and geographic location
- research or citizen jury's or assemblies
- involves budget to do this
- need for external expertise on sortition



# Recruitment approaches

## Communication approach

- direct contact if possible (phone, email, letter)
- traditional media (newspaper, press release, local media)
- social media (Facebook, Twitter, Instagram, LinkedIn, Tiktok, etc)
- use a mix of channels (direct, traditional and social media)
- paid advertisement
- communication expertise



# Recruitment approaches

## Targeted & diverse groups

- set characteristics targets (gender, age, location, education level, ethnic background, urban or rural)
- include people directly affected by certain policy area
- ask support of voluntary groups, civil society groups, NGO's
- co-design the PB process with them (workshop on co-design)
- tailor-made approach
- offer voucher/compensation



## What will you do to recruit the right people?

This PB funding programme is managed by Whoville Community Council. We want to spend £60,000 (Local Authority funding) on a PB process for the town. We are looking for project ideas that will benefit the community and make a significant difference to the town and local people. Project ideas should be focused on improving the **physical infrastructure** of the town which involves local people and **healthy activities for young people**.

- Age for voting - Primary age 12 and over
- Upper limit for project ideas - £10,000
- Funding must go to projects within Whoville geographical boundaries.
- Only projects based within the town can apply for funding



# Case: Whoville

## What will you do to recruit the right people?

Some facts on inhabitants of Whoville:

- You want to include as many **different groups** of people as possible, which recruitment approach would you choose?
- Some **youth** are open for a conversation, but many are hard to reach
- Whoville has a **community centre**, city council has never been there though
- There is a large amount of **elderly** in Whoville, some have never used Zoom
- Recently there has been an influx of Afghan **migrants** in Whoville, you want some of them to be part of the PB

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# Thank you!



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**demsoc.org**