Key PB Metrics Research Instruments and Evaluation Timeline

This part of the toolkit includes a set of research instruments to support local evaluations and to facilitate the collection of data that address the key PB metrics. To create these instruments, Public Agenda and PBP adapted surveys originally developed and used by local evaluators in various PB sites across North America. The Key PB Metrics Research Instruments are the following:

1. *Idea Collection Participant Survey Template*
2. *Voter Survey Template*
3. *Questionnaire for Evaluators and Implementers*

The idea collection participant and voter survey templates contain several questions for which local evaluators may need to adapt wording or fill in blanks to reflect the specifics of the PB process(es) they are evaluating; for instance, the question on whether participants voted in the most recent local election may be adapted to spell out more concretely which election the question refers to. We have highlighted in the templates where survey questions may need to be adapted before use.

If you have questions or require support in adapting these documents for your local context, please contact Chloe, Carolin or David at Public Agenda at research@publicagenda.org or 212-686-6610, extension 143.

For more a detailed description of the 15 Key PB Metrics on which these instruments are based, go to [http://www.publicagenda.org/pages/participatory-budgeting-research-and-evaluation](http://www.publicagenda.org/pages/participatory-budgeting-research-and-evaluation).

A Suggested PB Evaluation Timeline

Ideally, evaluation and data collection activities are integrated into each of the main phases of a PB process. Below is a timeline that illustrates when information about specific aspects of the PB process is best collected. The evaluation portion of the timeline focuses on data that directly inform the key PB metrics. Local evaluators may find it helpful to adapt this timeline to reflect additional or other evaluation objectives and data collection goals they may have.
### IMPLEMENTATION PHASE

#### Planning:
Implementers define process goals, write or revise the process Rulebook and establish roles and responsibilities.

#### Idea collection:
In large community meetings and online, residents learn about the available budget funds, brainstorm initial spending ideas and volunteer as budget delegates.

#### Proposal development:
Delegates meet in committees to review project ideas, consult with technical experts, develop full project proposals and prepare project posters and presentations.

### EVALUATION COMPONENTS

#### Questionnaire for Evaluators and Implementers:
- Steering Committee, or not
- List of community-based organizations (CBOs) on Steering Committee (if applicable)
- Dollar amount allocated for PB projects
- Name and size of the source budget for PB
- How the money can be spent / project eligibility criteria

#### Idea Collection Participant Surveys:
- Q: How did you hear about today’s assembly?
- Prior civic engagement
- Prior involvement with PB
- Voted or not in most recent local election

#### Questionnaire for Evaluators and Implementers:
- Opportunity to volunteer as a budget delegate, or not
- Number of active budget delegates (if applicable)
- List of budget delegates committees formed (if applicable)
See also: Library of Additional PB Research Instruments
For evaluators who are interested in further data collection, such as conducting qualitative interviews with participants and observing meetings, we have compiled a selection of additional research instrument templates. These instruments have been used previously in PB evaluations in the U.S. They do not directly inform the key PB metrics, but local evaluators may find them useful as they develop additional research questions. This Library of Additional PB Research Instruments currently includes additional demographic questions for participant surveys, sample budget delegate surveys, qualitative interview guides and sample meeting observation sheets.