

CIVICS
FOR ALL

Participatory
Budgeting
IN YOUR
SCHOOL

NYC Department of Education

Civics For All

A Passport to Social Studies

Economics and Participation in Government Companion

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Participatory Budgeting in Your School: Project Overview

for Administrators and Teachers

Participatory Budgeting (PB) is a democratic process in which community members decide how to spend a part of a public budget. In this case, the community members are students— even families, teachers, and staff—and the budget is a part of the school budget. Students collect ideas about the school’s needs, develop project proposals, and vote on projects to fund.”¹ The **Civics for All** PB project is meant to emulate, on a smaller scale, as closely as possible the process utilized by several New York City Council community districts.

The concept of participatory budgeting started in 1989 when Brazil’s city of Port Alegre started a new experiment to redirect resources to those with the greatest need. The participatory budgeting experiment to strengthen their new representative democracy worked. As PB has expanded in the US, scholars, practitioners, and participants have made two main claims about its impact: that it can revitalize democracy and advance equity. First, proponents argue that PB builds the trust, accountability, and effective decision-making necessary for democratic

governance (Lerner 2014). Second, they suggest that PB makes participation and funding more equitable, by bringing marginalized groups to the table and allocating more money to their needs (see Baiocchi, 2001; Fung & Wright, 2003; Nysten, 2002).²

As part of the Civics for All initiative, your school has received \$2,000 to fund a project proposed, researched, and promoted by students that will improve the students’ quality of life at school.

In 2011, four New York City Council Members launched the first participatory budgeting cycle in the city’s history. Since then, there have been seven subsequent PB cycles, and it has grown to allow stakeholders, as young as 11, in participating districts

1 Valeria Mogilevich. Participatory Budgeting Project. “A Guide to Participatory Budget in Schools.” V1.1 2017.

2 Madeline Pape and Josh Lerner. “Budgeting for Equity: How Can Participatory Budgeting Advance Equity in the United States?” *Journal of Public Deliberations* 10-13-2016.

to have a say in how at least \$1,000,000 of the districts' budget is spent. According to the City Council, "community members can propose and vote on projects like improvements to schools, parks, libraries, public housing, and other public or community spaces. A submitted idea is given to community volunteers, called Budget Delegates. Budget Delegates work at the district level to turn these ideas into real proposals for a ballot, with input from city agencies. These proposals are then up for a community-wide voting."³ In November 2018, New York City voters approved a city charter revision that will create a citywide participatory budgeting program.

As part of the **Civics for All** initiative, your school has received \$2,000 to fund a project proposed, researched, and promoted by students that will improve the students' quality of life at school. Your students will be reaching out to a bigger portion of the school community to collect ideas for projects and then helping to shape these ideas into viable proposals that will benefit your school community. Their proposals will ultimately be voted on by the entire school community, including the whole student body, staff members, and parents or guardians. This project is meant not only to educate students about how participatory budgeting works, but also to empower the students by involving them in a process requiring them to demonstrate, in a meaningful way, the skills and knowledge introduced and honed during Economics and Participation in Government courses. All efforts should be made to include appropriate school staff, by soliciting their opinions and expertise, early in the project development process in order to ensure project feasibility.

...the school must determine how to ensure the project is implemented in a manner that is as efficient and productive as possible.

The New York City Department of Education is committed to supporting learning environments that reflect the diversity and uniqueness of New York City high schools. The Civics for All Participatory Budgeting Guide includes directions for three different models from which schools can choose in order to make this project

³ New York City Council, "What is Participatory Budgeting?" *Participatory Budgeting*, accessed August 1, 2018. <https://council.nyc.gov/pb/>

accessible to all. However, even with these different models, schools may find it necessary to modify activities to suit their own needs and objectives. Some schools may opt to expand the role of the School Leadership Team, while others may determine that the Student Government Organization should take on added responsibility. To ensure a smooth process, whatever modifications are made should be clear to those involved at the onset.

It may be helpful for schools to form a Steering Committee to plan the pilot process of Participatory Budgeting where leaders, community members, and faculty collaborate on the best model for their school. Once a model is selected and deployed by the students and teachers, the Steering Committee will support them in event planning, outreach, and communication. Members of the Steering Committee and administrators may be involved in facilitating and helping to implement the steps leading up to the final vote. The students and teacher facilitators already on the Steering Committee will need assistance organizing how and when the presentations will be made, creating, and distributing the ballots, and tallying the results.

After the votes are tallied and the winning project is selected, the administration should decide how best to publicize the results to the school community. Lastly, the school must determine how to ensure the project is implemented in a manner that is as efficient and productive as possible. One option is to involve the student government or council. Another option is to for a staff member, such as an administrator, a Coordinator of Student Activities (COSA), or another designated teacher to take the lead, while working with the group of students who submitted the winning proposal.

Participatory Budgeting in Your School: Project Overview

for Students

Participatory Budgeting (PB) is a democratic process in which community members decide how to spend a part of a public budget. In this case, the community members are students— even families, teachers, and staff—and the budget is the school budget. Students collect ideas about the school’s needs, develop project proposals, and vote on projects to fund.”⁴ This PB project is meant to emulate as closely as possible the process currently utilized by several districts in the New York City Council, albeit on a smaller scale.

The concept of participatory budgeting started in 1989 when Brazil’s city of Port Alegre started a new experiment to redirect resources to those with the greatest need. The participatory budgeting experiment to strengthen their new representative democracy worked. As PB has expanded in the US, scholars, practitioners, and participants have made two main claims about its impact: that it can revitalize democracy and advance equity. First, proponents argue that PB builds the trust, accountability, and effective decision-making necessary for democratic governance (Lerner 2014). Second, they suggest that PB makes participation and funding more equitable, by bringing marginalized groups to the table and allocating more money to their needs (see Baiocchi, 2001; Fung & Wright, 2003; Nysten, 2002).⁵

As part of the Civics for All initiative, your school has received \$2,000 to fund a project proposed, researched, and promoted by students that will improve the students’ quality of life at school.

In 2011 four New York City Council Members launched the first participatory budgeting cycle in the city’s history. Since then, there have been seven subsequent PB cycles, and it has grown to allow stakeholders, as young as 11, in participating districts to have a

4 Valeria Mogilevich, Participatory Budgeting Project. “A Guide to Participatory Budget in Schools.” V1.1 2017.

5 Madeline Pape and Josh Lerner. “Budgeting for Equity: How Can Participatory Budgeting Advance Equity in the United States?” *Journal of Public Deliberations* 10-13-2016.

say in how at least \$1,000,000 of the districts' budget is spent. According to the City Council, "community members can propose and vote on projects like improvements to schools, parks, libraries, public housing, and other public or community spaces. A submitted idea is given to community volunteers, called Budget Delegates. Budget Delegates work at the district level to turn these ideas into real proposals for a ballot, with input from city agencies. These proposals are then up for a community-wide voting."⁶ In November 2018, New York City voters approved a city charter revision that will create a citywide participatory budgeting program.

As part of the **Civics for All** initiative, your school has received \$2,000 to fund a project proposed, researched, and promoted by students that will improve the students' quality of life at school. As students you will be reaching out to a bigger portion of the school community to collect ideas for projects and then helping to shape these ideas into viable proposals that will benefit your school community. Your proposals will ultimately be voted on by the entire school community, including the whole student body, staff members, and parents or guardians. This project is meant not only to educate you about how participatory budgeting works, but also to empower you by providing a meaningful opportunity to demonstrate the skills and knowledge you are developing while taking the Economics and Participation in Government courses, while at the same time empowering the entire school community to have a voice.

Remember, the work you do will in some way improve the school community, likely for years to come...

This participatory budgeting program has many components and phases. At times, you will be a Budget Delegate collaborating with your peers as part of a Research Committee (RC). Some of you will even be nominated to serve on a Steering Committee. Along the way you will become familiar with these terms, conduct research, synthesize information from a variety of sources, applying critical thinking skills to evaluate the feasibility of a proposal that will then be implemented in your school.

⁶ New York City Council, "What is Participatory Budgeting?" *Participatory Budgeting*, accessed August 1, 2018. <https://council.nyc.gov/pb/>.

All of the ideas that are generated in the PB process are valuable. As a member of the school community you will be able to participate in several ways, including voting in the final election. Remember, the work you do will in some way improve the school community, likely for years to come, so it is important to stay energized, meet deadlines, and ask questions along the way!



Participatory Budgeting Implementation Options

Participatory Budgeting is an important endeavor that helps to enrich and support the development of a school's culture. However, in the interest of creating several implementation models that meet different schools' needs, the resources contained within can be modified as appropriate.

MODEL A: A Single Class or a Limited Number of Participants in a Small School

This model works best with a limited number of classes. It is ideal where one or two Economics or Government classes are participating in the learning and researched activities. The Steering Committee creates the student body ballot for the selection of the project to be funded. All teams present project proposals to the SLT (School Leadership Team) for feedback before a final whole school-wide presentation to be voted on by every member of the school community.

MODEL B: Multiple Sections of Economics and Participation in Government Classes in a Large School

PHASE 1: CLASS LEVEL COMPETITION

At the classroom level, teachers of Economics or Participation in Government classes initiate the process in their respective classrooms using the Model A structure. At the classroom level, students vote to select one proposed project per teacher to move on to the second phase of the competition.

PHASE 2: SCHOOL-WIDE COMPETITION WITH FINAL DETERMINATION

At the school-wide level, the selected proposed projects are evaluated by a Steering Committee consisting of representatives of the school at large. The Steering Committee organizes and coordinates a planning session to finalize the top projects for the school. Finally, the Steering Committee organizes the logistics for a school-wide round of voting to select the final project to be funded. The final project is presented to the school community through a medium of their own choosing.

Model C: Student Government Organization or Extra-Curricular Club

This model works well for schools that want to implement Participatory Budgeting as an extra-curricular activity. For instance, the Student Government Organization (SGO) can facilitate the planning and research process for possible proposals to be voted upon by the entire school. Students from all grades are encouraged to participate in the project and the lead teacher can use the piloted project to inform future PB projects. The Steering Committee can be comprised of the SGO coordinator and Budget Delegates from each Research Committee in a format similar to Model A and then follow the same sequence of activities.



Timeline for Civics for All Participatory Budgeting

December 2018

Year 1 Schools Selected

Launch and Planning Sessions for Participating Schools

January 2019

- School administration and teacher(s) involved decide which model of Participatory Budgeting they will be using in their school.

Design the Process

1 Week/1 Session

- A Steering Committee is formed. The Steering Committee coordinates the PB process, setting aside dates for the project to be completed and establishing meeting days for the Committee.
- Teacher announces project to students.
- Students create a survey or a plan to collect ideas, identify problems, and the needs of the entire school community. They can model the survey after one of the templates available in Suggested Activity #11 as a guide.
- Steering Committee approves surveys and determines when and how it is distributed to the larger school community.
- Teacher organizes students into Research Committees (RCs) based on the student surveys.
- Each RC nominates student representatives to be Budget Delegates as well as a Budget Delegate Committee Chairperson who also serves on Steering Committee.
- The Budget Delegates administer the survey among the entire school population to collect data before the next session in order for the Budget Delegate Committee Chairpersons to present the data to the Steering Committee.
- The RCs establish their own norms, assign roles and responsibilities within their Committee, and designate meeting days outside of class, if necessary.

2 Weeks/4 Sessions

Collect Ideas

- Budget Delegates collect survey data and share the information about the PB project with other students. Students then analyze the survey data and formulate initial proposals based on the school community input.
- Budget Delegate Committee Chairpersons share these initial proposals with the Steering Committee.
- The Steering Committee sorts and discards impractical and/or infeasible proposals before selecting a maximum of seven of the strongest proposals to be distributed to the RCs.

1 Month/4–8 Sessions

Develop Proposals

- RCs begin to research the initial proposals that have been approved by the Steering Committee.
- Teacher(s) monitors progress of RCs, providing feedback.
- Experts may be invited to meet with RCs to offer ideas and troubleshoot possible barriers to implementation.
- RCs develop ideas into feasible and strong proposals.
- Budget Delegate Committee Chairpersons present proposals to the Steering Committee.
- Steering Committee reviews projects providing additional feedback prior to the school-wide vote to confirm costs and feasibility.
- Steering Committee creates the ballot and establishes the school-wide voting date.
- RCs refine proposals and prepare presentations for the community to vote on.

1 Week/1 Session

Presentations and Vote

- Students share project proposals with the rest of the school community so that everyone knows what they're voting on.
- Community members vote, from among the maximum of seven proposals, to implement **ONE** proposal.

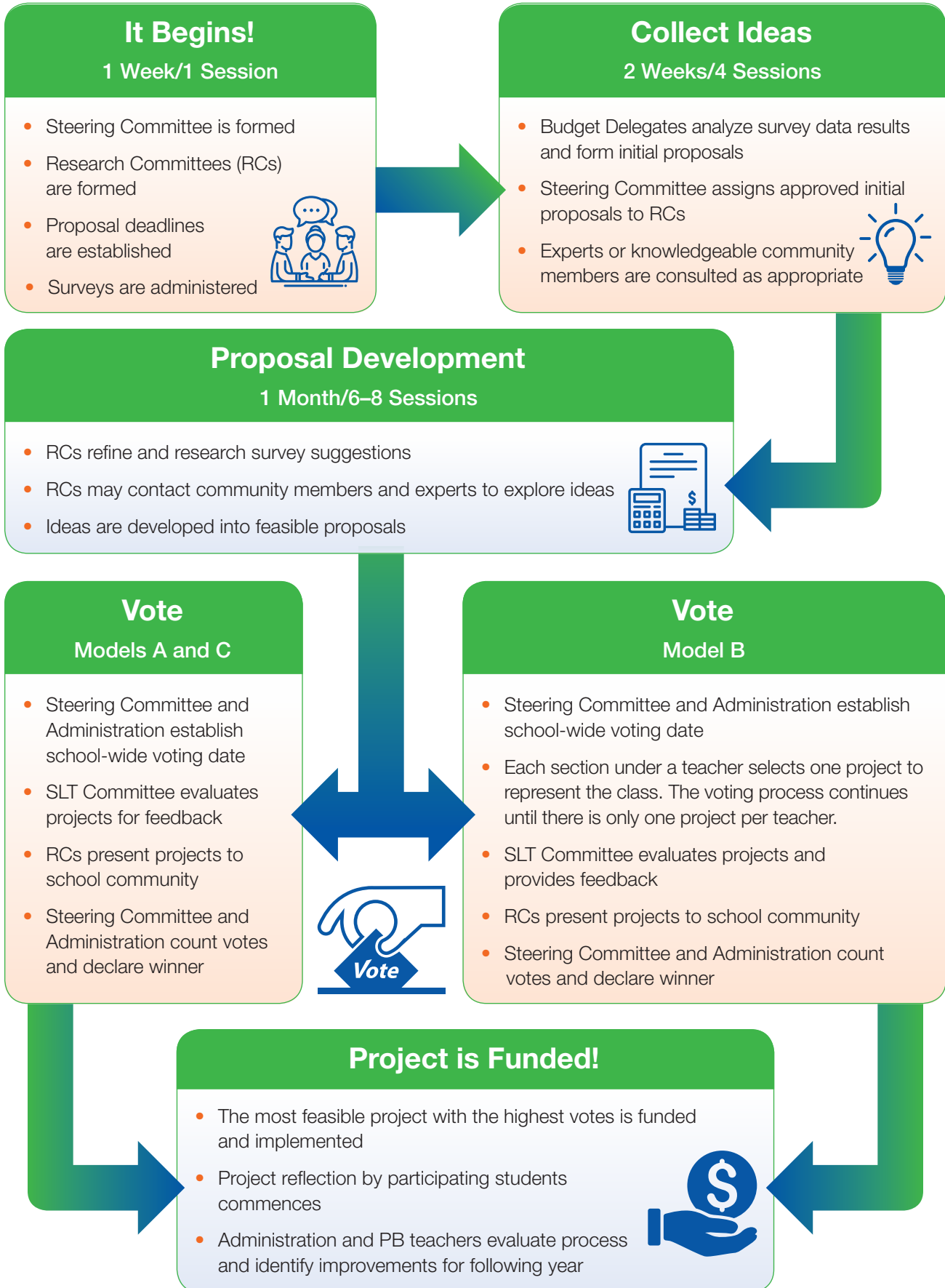
Spring 2019

Project Funded

May 2019

Share project with Year 1 PB Schools

Participatory Budgeting Process



Participatory Budgeting Committee Roles

Steering Committee

- May consist of the Principal, Assistant Principal, teacher(s) involved, the School Leadership Team, and **must** include one student representative from each Research Committee (known as the Budget Delegate Committee Chairperson).
- Students create a survey to collect ideas, identify problems, and the needs of the entire school community.
- The Steering Committee approves the school-wide survey and determines how and when the survey data will be collected.
- Once the survey has been administered and the data collected, the Steering Committee reconvenes and reviews initial proposals formulated by the Budget Delegates based on the data collected.
- The Steering Committee selects the strongest, most feasible initial proposals presented to them. A maximum of seven project ideas will then go back to the RCs who will research and strengthen the proposals.
- The Steering Committee will be responsible for the following:
 - When and how often the Steering Committee meets
 - When and where the surveys are distributed
 - When the projects are due
 - When and where the projects are presented to the school community
 - The logistics of the school-wide vote
 - Determining who is responsible for tallying the votes and announcing a winner

Budget Delegates

- Budget Delegates are also members of the Research Committees.
- Budget Delegates administer the surveys to the school community.
- Budget Delegates analyze the survey data, with their classmates, to identify initial proposals based on the data.
- Committee Chairs presents these initial proposals to the Steering Committee for approval on which ones to further continue their research.
- After presenting the project proposals to the Steering Committee, the Committee Chairs share the Steering Committee's decisions with their classmates so that the selected initial proposals can be strengthened and developed.

Research Committees (RCs)

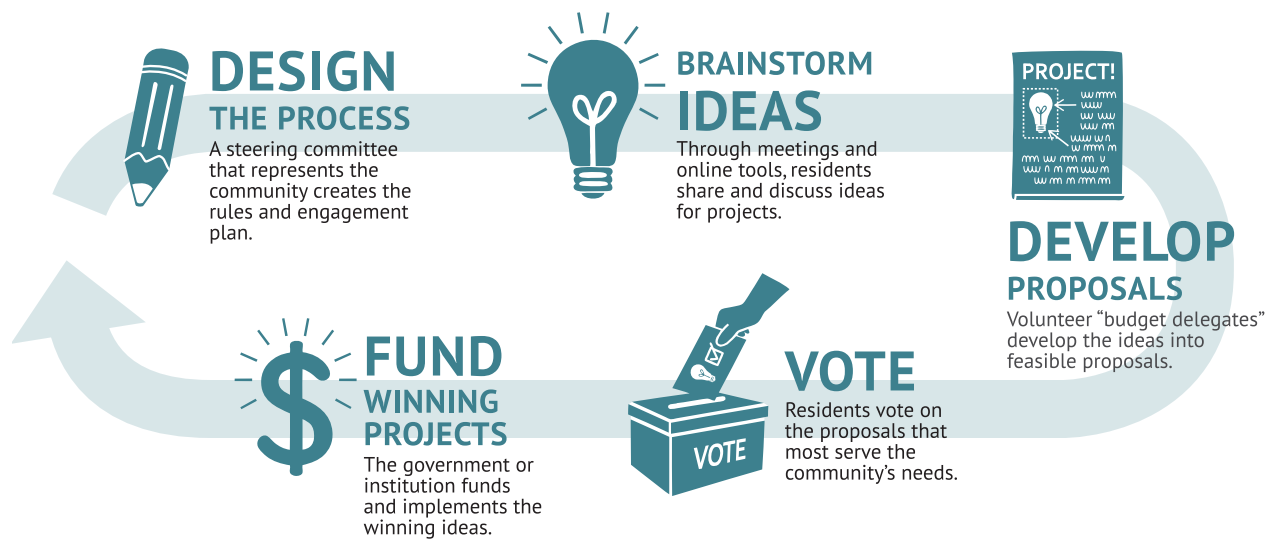
- Students divide into RCs. RCs conduct research and develop presentation proposals for a specific project.
- Each RC has a Committee Chairperson who also serves on the Steering Committee. Chairpersons are responsible for sharing their progress and providing updates of their group's work to the Steering Committee.

Learning Objectives for the Civics for All Participatory Budgeting Project

1. Students gain an increased understanding of what it means to be an active community member.
2. Students work collaboratively to identify potential solutions to community needs and create project proposals that address these needs.
3. Students use information from multiple sources to foster research skills, critical thinking skills, and basic budgeting skills.
4. Students evaluate campaigning strategies and develop public presentation skills to persuade others to support their proposal.
5. Students develop an increased concern about the welfare of others, develop a sense of social responsibility, and understand ways they can influence the larger community.

How Does PB Work?

PB is an annual cycle of engagement that is integrated into a regular budgeting process. A typical PB process follows these steps, usually over the course of a year:



Courtesy of the Participatory Budgeting Project

Suggested Activity 1

Introduction to Budgeting

Objective:

- Students analyze the purpose and function of creating a personal budget.

Materials:

- *Sample Student Budget*

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government
 - Managing your money
 - Strategies to achieve long-term goals
 - Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Activity:

- Teacher projects a T-Chart on the board with three expenses (a cell phone bill [\$71.50], a monthly Metro Card bill [\$121], and a variable category called “personal expenses” at value X) and one source of income (\$457 monthly income), and asks students to determine how much they should spend on “personal expenses” and how much should be “saved” by the end of the month.
- Students explain their rationale for saving X dollars and consider why it is necessary to keep track of their spending.

Suggested Activity 1

- Teacher facilitates class discussion by asking:
 - What does it mean to be living on a budget?
 - What are the terms associated with having a budget?
- Teacher explains that a budget is a plan that individuals, government, schools and other organizations use to plan their revenue (income) and expenses (spending).
- Teacher distributes the *Sample Student Budget* as a representative example of a budget facing a college student.
- Students analyze the income and expenses incurred in the sample budget to answer the following questions in small groups:
 - To what extent was the income used wisely? How can you tell?
 - Which costs were fixed? How can you tell?
 - Which costs were variable? How can you tell?
 - How might you have spent the money differently?
 - What is the purpose of making this budget?
 - How would you modify the budget if the expenses exceeded the income? Which items could be reduced or eliminated?
- Teacher creates two to three scenarios whereby students have to create a basic budget in small groups to track income and expenses.
- Students use information provided in their scenario to create a budget that fits each individual's specific needs.
- Teacher calls on groups to present their budget to the class based on the given scenario.

Wrap-Up:

- Students evaluate each budget that is presented and offer warm and cool feedback to improve the total amount of money saved or offer a rationale as to why more discretionary income was needed to be spent.

Extension Activities:

- Students track their own spending for a week and note whether or not their source of income is sufficient to manage their expenses.
- Students examine a paycheck to analyze how their taxes fund particular public programs at the city, state, or federal level.
- Students study a pie chart of the federal budget and consider how they might reallocate funds to better reflect how the money should be spent.

Suggested Activity 1

Additional Resources:

- Federal Reserve Bank of Dallas, Building Your Wealth: A Beginner's Guide to Securing Your Financial Future
<https://www.dallasfed.org/-/media/microsites/cd/wealth/index.html>
- National Endowment for Financial Education
<https://www.nefe.org/What-We-Provide/Programs-Initiatives/NEFE-High-School-Financial-Planning-Program>
- How to create a balanced budget – it's a 'Balancing Act'
<http://www.pbs.org/newshour/extra/lessons-plans/lesson-plan-how-to-create-a-balanced-budget-its-a-balancing-act/>
- Personal Finance Lesson Plan
<https://www.frbsf.org/education/activities/personal-finance-lesson-plan/>

Sample Student Budget

**Part Time
Job Income** **\$1,500**

Expenses	Amount
Entertainment	\$50 – \$150
Restaurants	\$75 – \$150
Credit Card Payment	\$0 – \$100
Internet/Cable	\$45
Rent	\$600
Utilities	\$60
Groceries	\$125 – \$200
Cell Phone	\$100
Laundry	\$20
Clothes/Shoes	\$75 – \$125
Savings	\$0 – \$350

Suggested Activity 2

New York City's Budget

Objective:

- Students examine the sources of New York City's budget as well as how the government's allocation of these funds reflects its priorities in a given year.

Materials:

- *The New York City Independent Budget Office, "Understanding New York City's Budget: A Guide"*
<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>
 - *Introduction* (p. 1)
 - *What is New York City's Budget?* (p. 2)
 - *Components of The City's Budget* (p. 3)
 - *Tradeoffs* (p. 5)
 - *Making Tradeoffs* (p. 6)
 - *Where Does Money Come From? and Where Does Money Go?* (p. 7)

NYC Social Studies Scope & Sequence 9–12:

Citizens Contribute and Participate 12.G3c, 12.G3d

Taxation

- Civic contribution and legal obligation
- Governments rely on taxation (income, property, and sales) as a major source of revenue

Finance and Personal Finance 12.E1b

- Opportunity cost, trade-offs
- The role of finance in business and government

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Suggested Activity 2

Activity:

- Students examine the *Where Does Money Come From?* and *Where Does Money Go?* pie charts and record two trends they notice for each as well as one question they have for each. The teacher facilitates a discussion whereby the students share their findings and questions with the class as well as respond to or comment on what their classmates share.
- Teacher facilitates class discussion by asking the following questions:
 - Which category of estimated revenues accounts for the largest share of the city’s budget?
 - Which category of estimated spending takes up the largest share of the city’s expenses? Why might that be the case?
 - Which categories of revenue or spending do you have questions about?

NOTE TO TEACHERS: As facilitator, by the end of the class discussion, ensure that the students are aware that some funding comes from state and federal aid (27%) while the vast majority comes from taxes levied on businesses and residents of the city.

- Students read *Understanding New York City’s Budget: A Guide*:
 - *Introduction*
 - *What is New York City’s Budget?*
 - *Components of The City’s Budget*

and then respond to the prompts that follow:

- The document states, “The budget is arguably the single most important policy document produced by the Mayor and the City Council.” Why do you agree or disagree with this statement?
 - The document states, “Community activists, lobbyists, and other interested and concerned New Yorkers also play a role [in the budget-making process].” What kind of role do you envision these people having? How do you think these people can become involved in the budget making process?
- Students read *Tradeoffs* and complete a *Save the Last Word* activity with a partner.

NOTE TO TEACHERS: *Save the Last Word*, also known as *The Final Word*, is an activity where one student selects a quotation from the text and reads it aloud. Other students take turns responding to the text, and the original student closes the discussion with a reflection. (Harvard Graduate School of Education, Teaching and Learning Lab, *Discussion Protocols*)

Suggested Activity 2

Wrap-Up:

- As a culminating activity, the students read *Making Tradeoffs*. Based on their own lives and experiences as residents of New York City, they identify five options in the list that are most important to them for what the \$10 million should be spent on, accompanied by a rationale. The teacher forms students into pairs for a Think, Pair, Share activity where the students explain their decisions, offer feedback, and reflect on the comments and/or questions posed by their partner.

Extension Activities:

- Students expand on the culminating activity by further researching their top pick and creating a campaign to convince their peers why their pick has the greatest need to be addressed.
- Students refer back to the two *Where Does Money Come From?* and *Where Does Money Go?* pie charts used at the beginning of the lesson to write a paragraph explaining how New York City's budget reflects the opportunity costs involved when creating a public budget.
- Students debate the pros and cons of the City running a deficit after reading the *Fiscal Discipline* and *The Capital Budget of Understanding New York City's Budget: A Guide*, p. 9-10 and *NYC Debt Outstanding*.

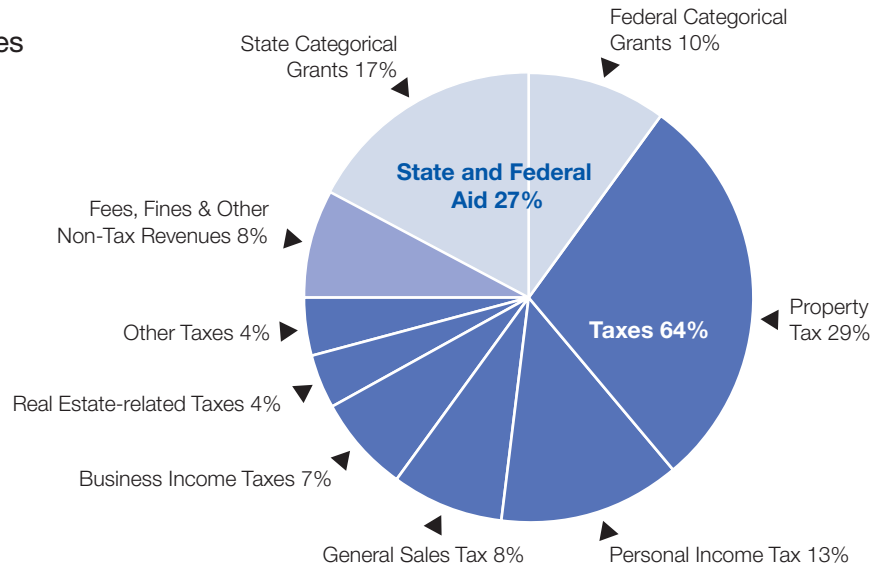
Additional Resources:

- Harvard Graduate School of Education, Teaching and Learning Lab, *Discussion Protocols*: https://www.gse.harvard.edu/sites/default/files/Protocols_Handout.pdf
- "NYC Debt Outstanding," *Citizens Budget Commission*: <https://cbcny.org/research/nyc-debt-outstanding>

Understanding New York City's Budget: A Guide

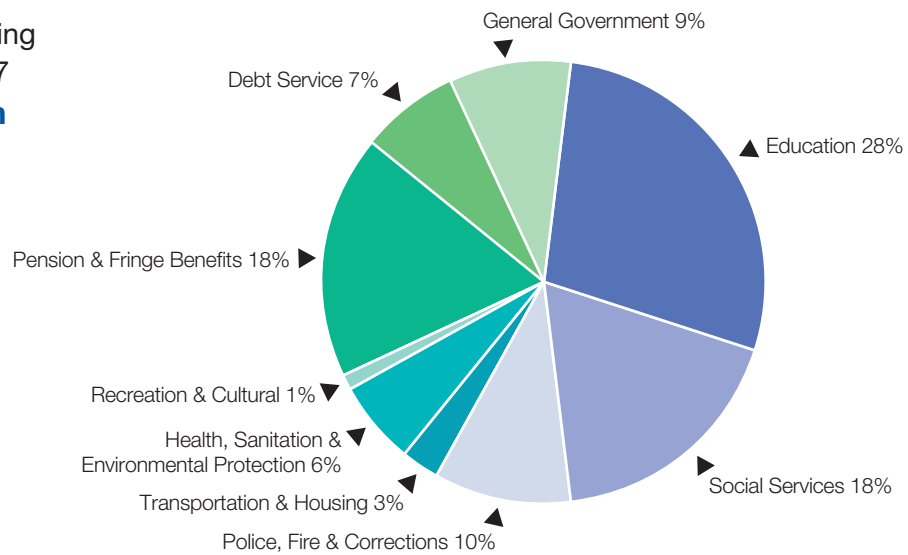
Where Does The Money Come From?

Estimated Revenues
NYC Budget 2017
Total \$85 billion



Where Does The Money Go?

Estimated Spending
NYC Budget 2017
Total \$85 billion



New York City Independent Budget Office, "Understanding New York City's Budget: A Guide," July 2017, p.7.
<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

Courtesy of the Independent Budget Office of the City of New York.

Understanding New York City's Budget: A Guide

Introduction

With about **\$85 billion** in annual spending, New York City's budget is bigger than that of all but a handful of states. But it is more than size that makes the city budget so critical. The budget expresses all of our key policy decisions and priorities. It determines who we tax and how much, and where we choose to spend our money for programs and services in areas such as education, sanitation, public safety, libraries, social services, housing, and economic development. Because there is never enough money to do it all, the budget reflects the priorities of the city's elected representatives.

Making decisions about priorities is part of the give-and-take that drives the city's annual budget-making process. It is a process that involves the Mayor, City Council Members, and other elected and appointed officials. Community activists, lobbyists, and other interested and concerned New Yorkers also play a role.

This guide is designed to help interested New Yorkers understand and participate in the city's budget process. Additional information on many of the topics discussed in the Guide can be found on IBO's website at www.ibo.nyc.ny.us or by calling the IBO office at (212) 442-0632.

Understanding New York City's Budget: A Guide

What is New York City's Budget?

The budget is arguably the single most important policy document produced by the Mayor and the City Council.

New York City budget is the place where many of the city's policy decisions are made and where policy objectives are articulated and implemented in concrete terms. The scope of the budget includes all of the city government's revenues and expenditures—estimated at about \$85 billion in 2017. More than an accounting device, the budget is arguably the single most important policy document produced by the Mayor and the City Council.

The Adopted Budget becomes a blueprint for:

How the city government spends money.

What activities are funded in a particular year and at what level? How much does it spend in operating and capital expenses for education, sanitation, public safety, sports stadiums, and a wide range of other activities?

How the city government pays for activities.

How much revenue is raised through, for example, different kinds of taxes, fees for services, and aid from the state and federal governments?

Balancing the city's budget.

The city is required by law to balance its budget. The city runs surpluses when revenues are greater than spending. Conversely, gaps are projected when spending is expected to exceed revenues. The city adjusts either revenues or spending plans, or both, in order to balance its budget.

The Adopted Budget covers one fiscal year, which in New York City begins on July 1st of each year and ends on June 30th of the following year.

New York City Independent Budget Office, "Understanding New York City's Budget: A Guide," July 2017, p.2.
<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

Courtesy of the Independent Budget Office of the City of New York.

Understanding New York City’s Budget: A Guide

Components of The City’s Budget

Key Dates

By **January 16th**, the Mayor releases the Preliminary Budget—proposed operating and capital expenditures, and forecast of revenues for the upcoming fiscal year, plus three subsequent years. The Council holds budget hearings with city agencies and the public.

.....

By **April 26th**, the Mayor presents the Council with the Executive Budget—a revised budget proposal for the upcoming year and a complete financial plan for the next three years. The Council again holds budget hearings and begins negotiations with the Mayor.

.....

By **June 5th**, the City Council completes negotiations with the Mayor and then votes to adopt a budget that will serve as the basis of government operations for the upcoming fiscal year.

Expense Budget

The Expense Budget funds current city government services, including the salaries of government employees, pensions, debt service, and routine operating expenses such as copier paper, pens and pencils, printing services, rent and utilities, and contracts (see Contract Budget below). It is a legally binding commitment to a level of appropriations for a particular fiscal year. It is the Expense Budget that people generally think of as “the city budget.”

Revenue Budget

The Revenue Budget contains an estimate of how much money the city government will take in during the fiscal year. This includes collections of taxes such as the general property tax, personal income tax, and sales tax; revenues generated by government agencies for services such as licenses, permits, and rental income; and categorical grants for specific programs or services received from the state and federal governments.

Contract Budget

The Contract Budget is a subset of the items included in the Expense Budget that are related to agency contractual services. It includes those city services that government contracts with others to deliver (for example, foster care services and services delivered by community organizations), as well as contractual services used in operating city agencies (for example, telecommunications and cleaning services).

Financial Plan

The Financial Plan accompanies the city budget and provides a multiyear perspective on city spending and revenues. The city’s Financial Plan is not a legally binding commitment to appropriations

Understanding New York City's Budget: A Guide

Components of The City's Budget *(continued)*

in future years, but rather shows how the current-year budget would affect budgets in future years. The Mayor releases a financial plan four times each year — these are commonly referred to as the Adopted Plan (June), November Plan, January Plan, and Executive Plan (April). While the first plan of each fiscal year reflects revenue and spending as estimated in the Adopted Budget, subsequent plans reflect changes in current year estimates.

Capital Budget

The Capital Budget is a separate budget covering one fiscal year, funding physical infrastructure used either in support of government operations (such as government offices, schools, and fire stations) or for general public use (such as roads, bridges, libraries, and parks). Almost all state and local governments in the United States maintain a capital budget or plan distinct from their Expense Budget. To be included in the Capital Budget, individual projects must have a value of at least \$35,000 and a period of probable usefulness of at least five years.

Capital Program

The Capital Program provides a multiyear plan detailing the funds needed for the current year and the next three fiscal years for projects already underway and new projects initiated in the Capital Budget.

Ten-Year Capital Strategy

The Ten-Year Capital Strategy is issued by the Mayor by April 26th of each odd-numbered year. The capital strategy details the city's plan for the development of capital facilities for the upcoming decade.

New York City Independent Budget Office, "Understanding New York City's Budget: A Guide," July 2017, p.3.
<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

Courtesy of the Independent Budget Office of the City of New York.

Understanding New York City's Budget: A Guide

Tradeoffs

In the budget process for any given year, there will be more requests to fund programs or provide tax relief than there is money to go around.

Each budget season is an opportunity to rethink how the city allocates its financial resources to achieve the goals and objectives of the Mayor and other elected officials. In the budget process for any given year, there will be more requests to fund programs or provide tax reductions than there is money to go around. As a result, policymakers face a wide variety of choices about allocating resources in the context of competing budget priorities.

Competing Demands

In addition to the goals and objectives of the Mayor, City Council Members, and other elected officials, there is a considerable amount of pressure on policymakers from a wide range of interest groups. Some may be urging cuts in taxes while others are demanding increases in services. Some concerns may be very neighborhood-specific, others citywide.

During the process of adopting the city budget for the upcoming fiscal year, the City Council committees responsible for various programs and services hold public hearings. Commissioners of city agencies testify regarding their ability to meet changing demands for service delivery under the allocations contained in the Mayor's budget proposals. In addition, representatives of the Borough and Community Boards as well as lobbyists for various interest groups, advocates for a variety of programs and services, and the general public have the opportunity to testify and voice their opinions about community or citywide needs. Other elected officials, including the Comptroller, Public Advocate, and the five Borough Presidents may also express their budget concerns in various forums.

As City Council members determine their priorities and decide how to vote on the Mayor's budget proposals, they must weigh the competing demands alongside the need to keep the city's budget in balance. This means ensuring that there are recurring revenues available to support a level of spending necessary to deliver an acceptable level of services. Finding that balance — both in fiscal and political terms — is what tradeoffs are about.

New York City Independent Budget Office, "Understanding New York City's Budget: A Guide," July 2017, p.5.
<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

Courtesy of the Independent Budget Office of the City of New York.

Suggested Activity 2

Understanding New York City's Budget: A Guide

Making Tradeoffs

What \$10 Million Buys

In New York City's budget \$10M could have funded any one of the following:

Child Care	1,377 child care vouchers (out of a total of 67,420)
Education	132 new teachers (the city employs about 75,000 teachers)
Environment	9.7 billion gallons of wastewater treated (about 2 percent of wastewater treated annually)
Fire	7 ladder trucks
Health	100 additional school based nurses
Homeless Services	213 homeless family shelter units for a year (about 1 percent of the average annual cost of sheltering families)
Parks	952 summer pool and beach season lifeguards (68 percent of seasonal lifeguards)
Police	72 police officers per year (the city employs about 23,800 personnel at the rank of police officer)
Jails	1.7 days of incarcerating the average daily population of 9,790 inmates in city jails
Public Assistance	Annual Safety Net Assistance grants for 1,936 recipients (there are 145,000 individuals receiving Safety Net Assistance)
Sanitation	9 days of disposal of residential garbage
Seniors	1.2 million home-delivered meals (4.5 million meals are delivered annually)
Street Resurfacing	67 lane-miles of city streets (about 5 percent of total lane miles resurfaced each year)
Small Business Services	13,558 job placements (48 percent of the workers hired through the Workforce1 Career Centers)
Tax Relief	\$2.68 personal income tax savings per city taxpayer

SOURCE: IBO

NOTES: All numbers are approximations based on information available at the time of publication. Personnel costs include salary and fringe benefits.

New York City Independent Budget Office, "Understanding New York City's Budget: A Guide," July 2017, p.6.

<https://www.ibo.nyc.ny.us/iboreports/understandingthebudget.pdf>

Courtesy of the Independent Budget Office of the City of New York.

Suggested Activity 3

Economic Decision Making

Objective:

- Students analyze the costs and benefits of economic decision making.

Materials:

- *Making Tradeoffs: What \$10 Million Buys* (from Suggested Activity #2)
- *Economic Decision Making Matrices*
- Computers for student research

NYC Social Studies Scope & Sequence 9–12:

Economics Decisions in Our lives 12.E1a

- People have personal economic goals and make economic decisions
- Economic decisions (opportunities, resources (income and wealth), preferences, and ethics)

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate summary of how key events or ideas develop within a text.

RH 7: Integrate and evaluate visual and technical information (e.g., in research data, charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Activity:

- Students review *Making Tradeoffs: What \$10 million Buys*, which is a list of prospective items that the City of New York could purchase with \$10 million.
- Students discuss with a partner what decision they believe is optimal use for public funds and rank the possible options from 1=best use of funds to 15=worst use of funds.
- Student pairs share their responses as to why they chose to rank the options in that way.
- Teacher projects a T-chart, with one side labeled “cost” and the other “benefit.”
- Students, still in their pairs, identify their top choice and complete a cost-benefit analysis chart.

Suggested Activity 3

- Teacher facilitates discussion around students' responses. Teacher asks guiding questions such as:
 - Did you find that the benefits outweighed the costs?
 - Was the choice that you ranked as the best use of funds, a choice that was more beneficial for the community or yourself? How do you know?
 - Was the choice that you ranked as the best use of funds, more beneficial for the short term or the long term? How do you know?
- Teacher then informs students that all choices have consequences, and in economics, the one not chosen or next best option is known as opportunity cost.

NOTE TO TEACHERS: It is important to reinforce cost benefit analysis throughout each step of the PB process so students understand that before public spending is approved, questions about who benefits from the spending and how the spending improves the community must be answered.

- Students research what they could purchase for \$2,000 for the school, ideally choosing at least six items. A list of sample items are included below:
 - 2 iPhone Xs
 - Murals of Community Heroes
 - A water bottle filtering system for student use
 - Community composting
 - Bubble Soccer
 - Medieval Fair
 - Free SAT prep for 15 seniors
 - Photo booth at prom
 - One \$2,000 scholarship for a graduating senior
- Students give their lists to a classmate, who then plots each item in *Economic Decision Making Matrices*, Matrix A, based on the item's perceived benefits to the individual (self) and the community.
- Students review how their partner plotted their items in Matrix A and reflect on the potential benefits of each item.
- Teacher facilitates a discussion where students consider how to arrive at a decision mechanism with high incidence of benefits to self and the school community with long-term implications.
- Using the insight gained from reviewing Matrix A, the students generate a new list, and plot it themselves into *Economic Decision Making Matrices*, Matrix B, which also takes into account long-term and short-term benefits.

Suggested Activity 3

Wrap-Up:

- Students summarize their finding in a 3-2-1 Activity, where they write down three things that they learned, two things they found interesting, and one question that they still have about trade-offs or cost-benefit decision making.

Extension Activities:

- Students can track their spending for a week and enter their spending choices into the *Economic Decision Making Matrices*. Students transfer their matrix to a chart and display in the class.
- Students pick a city agency, identify its mission statement and isolate at least 10 major expenditures detailed on the last year's fiscal budget. Students then complete *Economic Decision Making Matrices* and evaluate whether or not the choices made were moving the agency closer or further away from their mission statement.

Additional Resources:

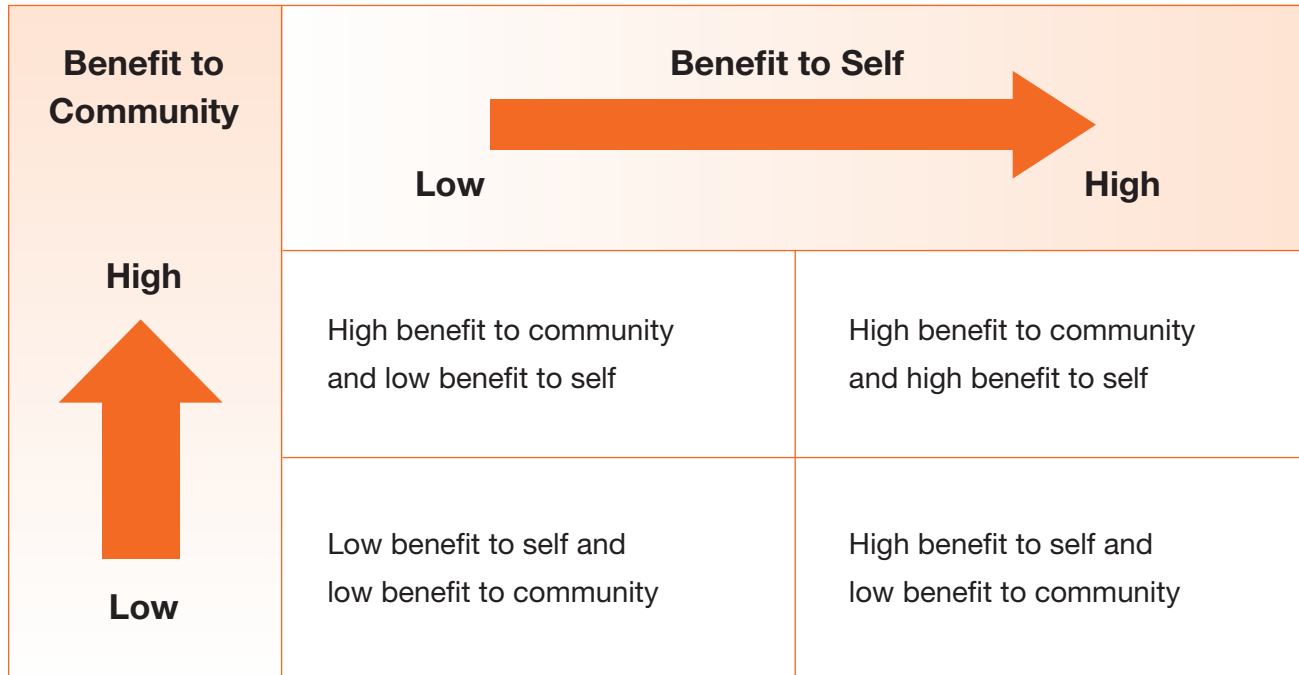
- The Irrational Consumer: Why Economics Is Dead Wrong About How We Make Choices: <https://www.theatlantic.com/business/archive/2013/01/the-irrational-consumer-why-economics-is-dead-wrong-about-how-we-make-choices/267255/>
- Decision-Making Should Be a Required Course in Every High School: <https://medium.com/s/story/farsighted-decision-making-should-be-a-required-course-in-every-high-school-6b5a836c1e1e>

Suggested Activity 3

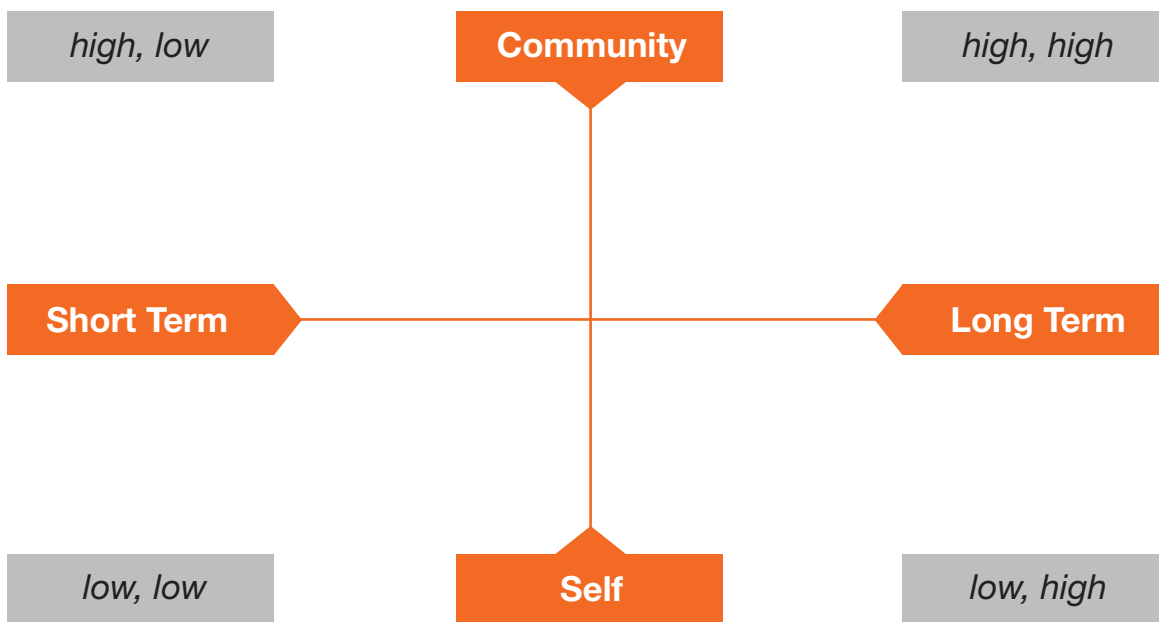
Economic Decision Making Process

Directions: Plot each economic decision as it relates to the relative benefits for individuals (self) and the community over the short-term and long-term periods.

A)



B)



Suggested Activity 4

School Funding

Objective:

- Students identify the different sources of funding for public schools.
- Students explore the consequences of inequities of school funding.

Materials:

- *FY19 Department of Education Preliminary Budget* graph
- *NY spends \$22,593 per pupil, but there's wide disparity:*
<https://www.lohud.com/story/news/politics/politics-on-the-hudson/2016/12/07/ny-spends-22593-per-pupil-but-theres-wide-disparity/95088028/>
- *This is what inadequate funding at a public school looks and feels like — as told by an entire faculty:*
https://www.washingtonpost.com/news/answer-sheet/wp/2018/02/09/this-is-what-inadequate-funding-at-a-public-school-looks-and-feels-like-as-told-by-an-entire-faculty/?utm_term=.3904c8ffa36c

NYC Social Studies Scope & Sequence 9-12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government,
Managing your money
- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Suggested Activity 4

Activity:

- Students evaluate the *FY19 Department of Education Preliminary Budget* graph and write two observations about how the budget is funded.
- Teacher facilitates a class discussion about the graph by asking questions such as:
 - How much funding do NYC schools receive from the federal government?
 - How much funding do NYC schools receive from the state government?
 - How much funding do NYC schools receive from local government?
 - Why does it matter that public schools receive funding from multiple sources?
- Teacher distributes copies of *NY spends \$22,593 per pupil, but there's wide disparity* for students to unpack how the education funds are distributed within New York state and challenges to funding equity.
- Students work in small groups to annotate the article and answer questions including:
 - What is one main source of funding that seems to contribute to inequity in school funding?
 - Who are the major stakeholders in determining education funding?
 - How does this article illustrate the controversy over school funding? Students should discuss where they think that NYC DOE schools fall in this discussion.
- Students examine a case study of a NYC school whose funding decreased over time based on the Washington Post article *This is what inadequate funding at a public school looks and feels like— as told by an entire faculty*.
- Students create a T-Chart with the activities and programs that the school was able to offer before budget cuts on one side and changes that occurred after the budget cuts on the other side.
- Student analyze their findings by discussing the following question:
 - Why is it important to be aware of and participate in budget allocation discussions?

Wrap-up:

- Students evaluate the significance of a school budget in funding programs that meet the needs and wants of their school community.

Extension Activities:

- Students meet with the School Leadership Team (SLT) to discuss possible budgetary constraints for the upcoming school year and discuss strategies to meet student needs.
- Students research other school districts in New York State to compare their per pupil expenses to New York City's per pupil expenses.

FY19 Department of Education Preliminary Budget

DOE City, State, & Federal Funding



Report of the Finance Division on the Fiscal 2019 Preliminary Budget and the Fiscal 2018 Preliminary Mayor's Management Report for the Department of Education
 March 23, 2018, p. 8

Suggested Activity 5

Introduction to Participatory Budgeting

Objective:

- Students analyze the various ways the public can participate in the allocation of city resources to fund particular projects.

Materials:

- *City Council Projects: FY18-22 Dollars in Thousands*
- *Participatory Budgeting Vocabulary*
- *Participatory Budgeting Overview for Students* (see p. 5)
- Participatory Budgeting Project “What is PB?” Video clip: www.participatorybudgeting.org/what-is-pb/

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts..

Activity:

- Students examine the *City Council Projects: FY18-22 Dollars in Thousands* chart and work in pairs to brainstorm the possible reasons why the available money was allocated for certain areas.

Suggested Activity 5

- Teacher facilitates class discussion by asking:
 - Which items on this budget are necessary? How can you tell?
 - Which items on this budget are not necessary? How can you tell?
 - How is this budget reflective of the values of the community of New York?
- Teacher distributes the Participatory Budget Guide Overview for Students and *Participatory Budgeting Vocabulary* worksheet, and explains the history, purpose, and goals of the **Civics for All** Participatory Budgeting project.
- Students work in small groups and draw a symbol for five vocabulary words on chart paper.
- Teacher facilitates a class discussion by asking two to three groups:
 - Why did you choose the symbol you did for the terms you were given?
- Students watch the video clip, *What is PB?* and reflect on the kinds of projects that have been funded in the city of New York via the city council.
- Teacher facilitates class discussion by asking:
 - How does the process of participatory budgeting encourage city residents to be more involved in their local community?
 - How does participatory budgeting give you a voice in the decisions made by government officials about how to distribute money for public works programs?

Wrap-Up:

- Students begin to brainstorm issues in their school that could reasonably be addressed with a \$2,000 budgetary cap.

Additional Resources:

- Participatory Budgeting Project website, including videos:
<https://www.participatorybudgeting.org/run-pb/videos-articles/>
- Community Development Project of the Urban Justice Center with the PBNYC Research Team. “A People’s Budget: A Research and Evaluation Report on Participatory Budgeting in New York City Cycle 3” 2014. https://cdp.urbanjustice.org/sites/default/files/CDP.WEB.doc_Report_PBNYC-cycle3-FullReport_20141030.pdf

Suggested Activity 5

City Council Projects: FY18-22 Dollars in Thousands

Preliminary Capital Commitment Plan by Agency <i>Dollars in Thousands</i>			
Agency	FY18-22 Plan	Budget Lines	Projects
Administration for Children's Services	508,772	33	99
Department For the Aging	62,900	32	75
Brooklyn Public Library	308,565	6	187
Correction	2,112,701	10	151
Courts	1,248,631	27	98
Cultural Institutions	984,630	560	1,054
CUNY	590,027	33	535
Dept. of Citywide Admin Services	5,425,205	223	1,050
Environmental Protection	15,359,139	72	1,829
DoITT	511,830	2	88
DOT	11,340,376	148	1,271
Economic Development	4,086,545	80	500
Education	13,955,522	20	30
Ferries and Aviation	395,716	5	71
Fire	933,622	15	230
Health	568,305	129	391
Health and Hospitals	3,050,359	17	377
Homeless	552,947	12	196
Housing Preservation Development	6,261,201	155	449
Human Resources	222,827	54	118
MTA Buses	37,448	2	3
NY Research Library	37,265	6	20
NYCHA	1,375,228	7	304
Police	1,972,092	23	360
New York Public Library	458,113	13	347
Parks	4,074,159	110	2,109
Queens Public Library	345,039	5	252
Sanitation	2,191,952	14	163
SIRTOA	3,550	2	2
Transit Authority	641,391	6	7
Total	79,616,057	1,821	12,366

City Council Projects: FY18-22 Dollars in Thousands.

"Fiscal 2019 Preliminary Capital Budget and Commitment Plan Overview."

March 20th, 2018, p. 6: <https://council.nyc.gov/budget/wp-content/uploads/sites/54/2018/03/FY19-Fiscal-2019-Preliminary-Capital-Budget-and-Commitment-Plan-Overview.pdf>

Suggested Activity 5

Participatory Budgeting Vocabulary

Allocation	A sum of money within an appropriation that is set aside for a specific purpose.
Appropriation	The amount of money identified in the budget for expenditure by an agency, generally divided into a number of smaller “units of appropriation.”
Budget	A plan to itemize income and expenses to prioritize and project possible projects that can be funded with limited financial resources.
Budget Delegate Committee	People who volunteer to research and develop project proposals for the ballot. In PB, Budget Delegates are delegated the authority and responsibility to serve on behalf of the full community, to identify projects that address community needs.
Capital Budget	A plan to raise funds for goods for long-term use.
Consumer	A person who purchases a product or service.
Community Participation	Involvement of people in a community in projects to solve their own problems and to develop their capacity to contribute to community development.
Debt	Owing money to a person or business.
Equity in Participatory Budgeting	Process of being fair and just leading to a more equitable distribution of public dollars within a community.
Empowerment	Granting greater authority to perform various acts or duties.
Expenses	Amount of money that needs to be spent in order to purchase a set of products to achieve a goal.
Expense Budget	A predetermined amount of money that is set by an individual or an organization to fund a project.
Fiscal Year	An accounting period of 12 months, which in New York City begins July 1 and ends the following June 30. Each fiscal year is named for the calendar year in which it ends (fiscal year 2018 begins in July 2017 and ends in June 2018).
Implementation	The process of carrying out a plan of action.

Suggested Activity 5

Inclusion	Involvement and empowerment, where the inherent worth and dignity of all people in a community are recognized; in PB processes this means including people and groups who are typically underrepresented or marginalized.
Individual Research Committees (IRC)	Committees, comprised of Budget Delegates and a Committee Chairperson (nominated by the individual research committees), that research proposed ideas for change.
Investment	To allocate funds to develop a project or to make profits in the form of interest.
Opportunity Cost	The cost or sacrifice involved when choosing between two alternative scenarios (e.g., time and money are involved when choosing to commute to college or to live on a college campus).
Participatory Budgeting	A process in which community members identify needs in their community and then directly decide how to spend part of a public budget by researching and voting on resident-driven proposals that work to solve these community needs.
Proposal	A suggestion for a plan to be carried out.
Research Committees (RCs)	Comprised of Budget Delegates and a Committee Chairperson who research proposed ideas for change.
Resources	Supplies of goods or services available to a person, business, or government.
Scarcity	The economic phenomena whereby individuals must make choices about how to distribute a limited set of resources to meet unlimited wants and needs.
Stakeholder	A person who has a personal interest or involvement in something
Steering Committee	The committee that establishes rules and guidelines for the duration of the participatory budget project.
Taxes	A required contribution from individuals and businesses to pay for numerous services and facilities provided by the government.
Transparency	The quality of being easily seen through; honesty and openness in a business or governance context.

Suggested Activity 6

Who Participates in Participatory Budgeting

Objective:

- Students evaluate a research report to identify and assess voting trends in Participatory Budgeting in New York City.

Materials:

- *Did You Vote?* video clip:
<https://pix11.com/2017/03/30/did-you-vote-nyc-residents-telling-some-city-council-members-how-to-spend-20-percent-of-budget/>
- Community Development Project of the Urban Justice Center and the PBNYC Research Team. *“A People’s Budget: A Research and Evaluation Report on Participatory Budgeting in New York City Cycle 3”* 2014

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government
- Managing your money
- Strategies to achieve long-term goals
 - Budgeting

Next Generation Learning Standards:

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Suggested Activity 6

Activity:

- Students view *Did You Vote?* video clip.
- Teacher facilitates a class discussion by asking:
 - Why do you think so many people do not know about participatory budgeting?
 - What issues arise when the majority of people in a community do not know about a participatory budgeting?
 - Did it surprise you that a 14-year-old can vote to decide where to spend taxpayer money?
- Students analyze a sample community district taken from *A People's Budget: A Research and Evaluation Report on Participatory Budgeting in New York City* to assess the demographics of the communities who took part in Cycle 3 of Participatory Budgeting in New York City during 2014.
- Students compare the demographics to the voting demographics in the report to answer the following questions:
 - What claims does the report make about the voting trends from previous cycles within the different demographics?
 - How did these voters find out about the vote?
 - What are still some areas in which the city can improve its outreach efforts?
- Students work in pairs to brainstorm ways in which the city can inform community members and develop an action plan to inform voters.

Wrap-Up:

- Students examine the interactive “myPB” website by the Participatory Budgeting Project to identify districts, projects, costs of projects, and who voted to approve certain projects.

Extension Activities:


- Students create a hashtag for a social media campaign to make community members aware of participatory budgeting in their communities.
- Students create a social media campaign to make community members aware about voting in participatory budget cycles.

Additional Resources:

- *Ex-Prisoners Tell NYC How to Spend Money:*
<https://nextcity.org/daily/entry/participatory-budgeting-new-york-city-meetings-ex-prisoners>
- *Participatory Budgeting Project. “myPB” 2018* <http://myPB.info>
- *Probability of Voting in the General Election:*
<https://www.participatorybudgeting.org/participatory-budgeting-increases-voter-turnout-7/>

A People’s Budget: A Research and Evaluation Report on Participatory Budgeting in New York City

Council districts that have participated in 3 PB Cycles:
Cycle 1 (2011–12), Cycle 2 (2012–13) and Cycle 3 (2013–14)
Districts 8, 32, 39 and 45

Council Member	District	Neighborhoods	Total PB Participants in Cycle 3	Amount Allocated in Cycle 3	Key Demographics	Unique Characteristics
Speaker Melissa Mark-Viverito (Democrat) 	8th Man Bnx	Concourse El Barrio/ East Harlem Highbridge Longwood Mott Haven ¹²	1,939	\$1,985,000 to 5 winning projects	69% of the district’s population identifies as Hispanic or Latino/a and 26% as African-American or Black. ¹³ 55% of residents speak Spanish as their primary language. ¹⁴	The district has the highest concentration of public housing in the city. ¹⁵ One of only two Council Districts that span two boroughs. Redistricting significantly changed the district boundaries since the last PB cycle. The Bronx section, previously only a small portion of the district, was expanded significantly, and Bronx and Manhattan neighborhoods now make up nearly the same share of the district.
	32nd Qns	Belle Harbor Breezy Point Broad Channel Hamilton Beach Lindenwood Neponsit Ozone Park Rockaway Beach South Ozone Park South Richmond Hill Woodhaven ¹⁶	983	\$2,026,000 to 11 winning projects	42% of the district’s population identifies as White, 35% as Hispanic or Latino/a, and 15% as Asian. ¹⁷ 39% of the district has a household income between \$25,000 and \$75,000. ¹⁸	This is the district’s third cycle participating in PB, but first time the entire district has taken part. The district had two distinct voting processes—one for the Rockaways portion of the district and one for the mainland Queens section of the district. Much of the district is still recovering and rebuilding from the impact of Hurricane Sandy.

Suggested Activity 6

Council districts that have participated in 3 PB Cycles: Cycle 1 (2011–12), Cycle 2 (2012–13) and Cycle 3 (2013–14) **Districts 8, 32, 39 and 45**

Council Member	District	Neighborhoods	Total PB Participants in Cycle 3	Amount Allocated in Cycle 3	Key Demographics	Unique Characteristics
 Brad Lander (Democrat)	39th Bkln	Borough Park Cobble Hill Carroll Gardens Columbia Waterfront Gowanus Kensington Park Slope Windsor Terrace ¹⁹	2,509	\$1,515,000 to 7 winning projects	57% of residents have a Bachelor's or graduate degree. ²⁰ 51% of the district has a household income \$75,000 or above. ²¹	The district is intersected by the Gowanus Canal and contains several parks and cemeteries. These geographical characteristics create distinct neighborhoods including higher-income Park Slope, Kensington with its large Bangladeshi population and Borough Park, a Jewish enclave.
 Jumaane D. Williams (Democrat)	45th Bkln	East Flatbush Flatbush Flatlands Parts of Midwood and Canarsie	1,107	\$1,161,000 to 4 winning projects	66% of the district's population identifies as African-American or Black and 21% as White. ²³ 58% of district residents were born outside of the U.S. ²⁴	East Flatbush has the largest foreign-born population in Brooklyn, made up of immigrants from Jamaica, Haiti, Trinidad and Tobago. ²⁵




Suggested Activity 6

Council districts that have participated in 2 PB Cycles: Cycle 2 (2012-13) and Cycle 3 (2013-14)

Districts 23, 33 and 44

Council Member	District	Neighborhoods	Total PB Participants in Cycle 3	Amount Allocated in Cycle 3	Key Demographics	Unique Characteristics
Mark Weprin (Democrat) 	23rd Qns	Bayside Hills Bellerose Douglaston Floral Park Fresh Meadows Glen Oaks Hollis Hollis Hills Hollis Park Garden Holliswood Little Neck New Hyde Park Oakland Garden Queens Village ²⁶	2,212	\$1,105,785 to 5 winning projects	39% of the district's population identifies as Asian and 33% as White. ²⁷ 53% of residents primarily speak a language other than English. ²⁸	The district has no subway stations. The district is largely comprised of residential neighborhoods in eastern Queens.
Stephen Levin (Democrat) 	33rd Bkln	Bedford-Stuyvesant Brooklyn Heights Boerum Hill Downtown Brooklyn DUMBO Greenpoint Vinegar Hill Williamsburg ²⁹	2,148	\$1,548,000 to 5 winning projects	75% of the district's population identifies as White and 15% as Hispanic or Latino/a. ³⁰ 50% of residents have a Bachelor's or graduate degree. ³¹	There are several large public housing developments in the district. The district spans the East River waterfront from Greenpoint down to Boerum Hill and includes downtown Brooklyn.
David Greenfield (Democrat) 	44th Bkln	Bensonhurst Borough Park Midwood ³²	1,270	\$970,000 to 4 winning projects	77% of the district's population identifies as White. ³³ 66% of district residents primarily speak a language other than English. ³⁴	The Borough Park neighborhood is home to one of the largest Orthodox and Hasidic Jewish communities in the U.S. ³⁵

Council districts that were new to PB this Cycle (2013-14) Districts 5, 31 and 38

Council Member	District	Neighborhoods	Total PB Participants in Cycle 3	Amount Allocated in Cycle 3	Key Demographics	Unique Characteristics
 Ben Kallos (Democrat)	5th Man	Upper East Side Roosevelt Island Sutton Place ³⁶	567	\$800,000 to 3 winning projects	76% of the district's population identifies as White, 11% Asian, and 10% Hispanic or Latino/a. ³⁷	The district only participated in the voting phase of PB, using a ballot of pre-approved, not yet funded projects. The district encompasses Roosevelt Island, which is the East River between Manhattan and Queens.
 Donovan Richards (Democrat)	31st Qns	Participating neighborhoods: Ayerne Bayswater Eggenere Far Rockaway Hammels ³⁸	2,213	\$1,257,000 to 5 winning projects	79% of district residents in the participating neighborhoods have less than a Bachelor's degree. ⁴⁰ 41% of residents in the participating neighborhoods are under 25 years old. ⁴¹	Only the Rockaway portion of the district participated in PB. Part of the district is on the Rockaways Peninsula and is difficult to reach from the rest of the city. Much of the district is still recovering and rebuilding from the impact of Hurricane Sandy.
 Carlos Menchaca* (Democrat)	38th Bkin	Red Hook Sunset Park South Slope and parts of Windsor Terrace Borough Park Bensonhurst and Bay Ridge ⁴²	3,236	\$2,170,000 to 6 winning projects	44% of the district's population identifies as Hispanic or Latino/a, 35% as Asian, and 19% as White. ⁴³ 53% of district residents were born outside of the U.S. ⁴⁴	Sunset Park has the largest Chinatown in Brooklyn and a large Latin American population. Portions of the district were significantly impacted by Hurricane Sandy, including Red Hook, which has a large amount of public housing. Recovery and rebuilding are ongoing.

* Note that Sara Gonzalez, who previously held office in District 38, made a commitment to dedicate \$2 million to participatory budgeting. In November 2013, Carlos Menchaca was elected, and maintained that commitment.

Community Development Project at the Urban Justice Center with the PBNYC Research Team. "A People's Budget: A Research and Evaluation Report on Participatory Budgeting in New York City Cycle 3." p. 12-15.

https://cdp.urbanjustice.org/sites/default/files/CDPWEB.doc_Report_PBNYC-cycles3-FullReport_20141030.pdf

Suggested Activity 6

Suggested Activity 7

Is Participatory Budgeting a Good Thing?

Objective:

- Students evaluate the benefits and drawbacks of participatory budgeting.

Materials:

- *Participatory Budgeting Opens Up Voting to the Disenfranchised and Denied:*
<https://www.nytimes.com/2015/04/19/nyregion/participatory-budgeting-opens-up-voting-to-the-disenfranchised-and-denied.html>
- *Participatory Budgeting: Increasing the Power of the Taxpayer over Public Expenditures:*
<http://chicagopolicyreview.org/2014/11/14/participatory-budgeting-increasing-the-power-of-the-taxpayer-over-public-expenditures/>
- *Participatory Budgeting: Why Not Fix Everyone's Sink?:*
<https://shelterforce.org/2018/06/05/participatory-budgeting-why-not-fix-everyones-sink/>
- *Debate Carousel Handout*

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government
- Managing your money
- Strategies to achieve long-term goals
 - Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate summary that makes clear the relationships among the key details and ideas.

11-12SL1: Initiate and participate effectively in a range of collaborative discussions with diverse partners on complex topics, texts, and issues; express ideas clearly and persuasively, and build on those of others.

Suggested Activity 7

Activity:

- Teacher facilitates a class discussion by asking:
 - How does participatory budgeting give you a voice in the decisions made by government officials about how to distribute money for public works programs?
- Students work in small groups to closely read and annotate one of three articles:
 - *Participatory Budgeting Opens Up Voting to the Disenfranchised and Denied*
 - *Participatory Budgeting: Increasing the Power of the Taxpayer over Public Expenditures*
 - *Participatory Budgeting: Why Not Fix Everyone's Sink?*
- Students take part in a Debate Carousel to assess the consequences of participatory budgeting.
- Teacher facilitates class discussion by asking:
 - Do the benefits of including the public in budget decision making outweigh the criticisms of participatory budgeting?

Wrap-Up:

- Students discuss the following: In 2015, 14.5 Million Dollars of the City's 75 Billion Dollar budget was allocated to participatory budgeting.
 - Do you think that the residents should have more of a say in how budgetary funds are allocated?
 - Or should residents trust their officials to allocate budgetary funds?

Extension Activities:

- Students closely read and annotate *Reflections on Participatory Budgeting in New York City* to identify ways in which the city has reflected and improved on practices of Participatory Budgeting.

Additional Resources:

- Reflections on Participatory Budgeting in New York City:
https://innovation.cc/scholarly-style/2015_20_2_7_castillo_participatory-budget-usa.pdf
- Is Participatory Budgeting Good for Democracy?
<https://www.headcount.org/is-participatory-budgeting-good-for-democracy/>
- Participatory Budgeting Grows in NYC - Why Isn't Every Council Member Doing It?
<http://www.gothamgazette.com/government/5946-participatory-budgeting-grows-in-nyc-why-isnt-every-council-member-doing-it>

Participatory Budgeting: Increasing the Power of the Taxpayer over Public Expenditures

Shaun Edwards, November 14, 2014

Today in the United States, many local governments face a tension between balancing a shrinking budget and addressing a growing demand to increase public expenditures. Government officials are challenged to meet expectations for greater public services, and, as a consequence, tend to rely heavily on debt financing to avoid budget cuts towards these expenditures. Underlying these decisions, governments struggle to understand the priorities of local residents, avoid spending inefficiencies that waste taxpayer money, and allocate funding towards projects that offer the greatest value of benefits for constituents.

The author of “The Effects of Participatory Budgeting on Municipal Expenditures and Infant Mortality in Brazil,” Sonia Goncalves, reveals that allowing the public to vote on the allocation of public funding results in increased political accountability and responsiveness. Specifically, the study explains how participatory budgeting in Brazil increased the portion of public expenditures in health and sanitation services and consequently decreased the high infant mortality rate that historically plagued the country.

The city of Porto Alegre, Brazil implemented the first model of participatory budgeting in 1989. Participatory budgeting has since been leveraged in approximately 1,500 municipalities globally, including district level models in Chicago, New York, and Boston. Participatory budgeting is defined as a democratic process that allows community members to determine how to spend a portion of their budget. Cities use a multi-tier process that begins with small meetings to discuss and pick projects. Volunteer delegates analyze the feasibility of the proposed projects and write budget proposals for those that are valid. Lastly, participants vote on a menu of approved projects and monitor the implementation of the winning projects following the vote. The main goals of participatory budgeting are empowerment, inclusion, and equality. However, the popularity of the process revolves around the notion of enhancing government transparency, accountability, and responsiveness regarding how to budget taxpayer funding.

The author uses a series of regressions to answer the broad question of whether participatory budgeting improves political accountability and government responsiveness. The data used in the study is collected from a panel of Brazilian municipalities for the period between 1990 and 2004. In the 1980s, one of the top issues in Brazil concerned sanitation, specifically water quality. By allowing the public to vote through participatory budgeting, the budget allocation for health and sanitation services increased by two to three percentage points, which reflected a 20 to 30 percent increase in the total budget allocation for these services. Even though the allocation to health and sanitation increased, the total budget did not increase, therefore making this a budget neutral mechanism for Brazil.

Additionally, as a result of increases to health and sanitation services, the infant mortality rate dropped by five to ten percent of the total infant mortality rate. Specifically, Brazil decreased its average infant

Suggested Activity 7

mortality from 48 to approximately two infants for every 1000 infant residents. The author is able to associate the decline in the infant mortality rate to the larger expenditure allocated to health and sanitation services (i.e., cleaner water for municipalities).

There are two main issues that arise naturally from using participatory budgeting as a mechanism for public inclusion, empowerment, and equality. The first issue is selective participation by the “usual suspects,” meaning that only voters with specific preferences and who normally turn out for local elections participate and vote. As a result, the projects chosen may not always reflect the preferences of the representative area. The second issue is that a perception of tokenism occurs, meaning that the residents are given power over such a small budget allocation that any impact to resident voters is relatively small. In this way, representatives are perceived by the larger population as yielding power to citizens, even though this power is minimal.

In the United States, the issues above as well as concerns about voter education are pervasive in cities that have implemented participatory budgeting. Specifically, concerns about bottom-up policy making revolve around the ability of the public to become informed about the public budgeting process itself. An evaluation of New York’s participatory budgeting program in 2011 revealed that 75 percent of the projects initially proposed were not eligible for the participatory program, falling under expense funds rather than the discretionary capital funds required for eligibility. Lack of voter knowledge on public budgeting, combined with selective participation and tokenism plague the process and may slow down its acceptance as a norm into municipal government in the United States.

Funding projects through collective action makes participatory budgeting an attractive and innovative method for prioritizing public projects. Given the composition of neighborhoods in the United States, the feasibility of participatory budgeting at the district or ward level within major cities is practical. Including the public in the responsibility of how the city or their local representative should prioritize and allocate funding to match preferences in their local district, the participatory budgeting model works well in the United States and continues to gain popularity within larger cities. While research from this study effectively shows that participatory budgeting is beneficial to municipalities in Brazil, more comprehensive and evaluative research is needed to explore the actual effects of the existing programs in the United States.

“Participatory Budgeting: Increasing the Power of the Taxpayer over Public Expenditures” by Shaun Edwards, Nov. 14, 2014. Chicago Policy Review. <http://chicagopolicyreview.org/2014/11/14/participatory-budgeting-increasing-the-power-of-the-taxpayer-over-public-expenditures/> By permission of Shaun Edwards.

Participatory Budgeting: Why Not Fix Everyone's Sink?

Liza Featherstone. June 5, 2018.

"Participatory budgeting is democracy in action," proclaims a recent email to constituents from Brad Lander, a progressive city councilman in Brooklyn, New York.

We hear a lot of claims of this kind from proponents of participatory budgeting, a process that has been adopted throughout the U.S., which enables citizens to vote on how part of a municipal budget will be spent. New York City Council's website touts participatory budgeting as a way to give "real power" to people who have never before been engaged in the political process. Participatory Budgeting on NYC's Twitter account offers an irresistible invitation: "YOU Decide How to Spend Taxpayer Dollars!"

Just like a focus group or any mechanism intended to give us a voice, participatory budgeting can *feel* a lot like democracy. It offers a glimpse of how a more civically engaged society might work. But it's also a distraction from the actual mechanisms of power, and can reinforce or even worsen existing inequalities.

Celina Su, a Brooklyn College political scientist who has studied the matter, observes that the process tends to favor those with social power. Her findings show, as you might expect, that people with resources are more likely to lobby for projects that serve their communities, and to run successful campaigns. My own Brooklyn City Council district, located not far from Lander's, includes many poor neighborhoods and poor people, yet more than half the projects on the ballot this year served gentrifying populations. Last year, a proposal to improve a garden in a local housing project lost by just a couple thousand votes. On Staten Island last year, all three proposed improvements to a housing project were voted down. In Lander's district, all of the winning capital projects served well-off or gentrifying neighborhoods.

There might be ways that such inequalities could be mitigated to make the process fairer. Officials overseeing the process could do more outreach in poorer neighborhoods and place more curbs on the participation of the rich and savvy. But an even more intractable problem, as Gianpaolo Baiocchi, a scholar who has studied participatory budgeting, has observed, is that these contests over relatively small amounts of money can distract activists from trying to gain real power in the political system.

In my district, all of this year's proposed projects were necessities, not just stuff that somebody thought might be cool. Making an elementary school building safer should not be left up for a vote, and shouldn't have to compete with fixing the electrical system at my beloved branch library. The fact that both were viewed as optional and were even on this ballot, pitted against one another, reflected a lack of popular power. In a rich and prosperous city, everyone's needs should be met.

It's great that Lander's district voted to fix "derelict" (the wording on the ballot) sinks in a kindergarten classroom, but why should such an important priority be up for a vote? The same could be said for making a branch library in Queens more accessible to people with disabilities (an item on last

Suggested Activity 7

year's ballot). Last year, many of the participatory budgeting projects throughout the city involved air conditioning for public school buildings, all of which stay open through June, and many used for summer school classes. The public voted to fund some of these, and not others. Yet, on some summer days, New York City temperatures reach well over 90 degrees. Why choose whose children must suffer in sweltering heat? It's horrible to hold a "Hunger Games" process to decide whether to make a school playground safer and more accessible, or to resurface a public soccer field. These things should simply be done, without any self-congratulatory gimmicks or rigmarole.

The reason these kindergarten sinks are in such sorry condition in the first place is because of a regime of austerity imposed upon the New York City public sector ever since the 1970s, by real estate and finance industry elites who don't want to have to pay higher taxes, a status quo that conservative Democrats and Republicans in the state capital are happy to protect. The only solutions are electing more people who favor redistribution into office in Albany, and organizing to build power for the 99 percent, whether through tenants' groups, unions, or left political parties.

While participatory budgeting originated in Latin America in the context of such ambitious efforts, Baiocchi and Ernesto Ganuza observed in a 2014 paper, in the United States, it has been completely disconnected from any left institutional projects.

"Choice"—as we know from the past two decades of so-called education reform— should not make the poison pill of austerity any easier to swallow. Neoliberal policymakers think that we should be happy that we get to choose our children's schools, even though they are all underfunded. Ultimately, participatory budgeting is a similar scam. The pleasure of making choices can't make up for stark inequalities and scarcity. While getting to vote on the budget is fun, it doesn't come close to giving citizens "real power"—or even distributing the crumbs of influence equitably.

One caveat is that in the context of a well-funded public sector that met every community's basic needs, participatory budgeting would be a wonderful way to encourage inventive policy-making. A lot of innovation can come from engaging people who are outside the policy world. Some of the winning projects in Lander's district this year—for example, a study of endangered bats in Prospect Park— were exciting ideas that will probably never correspond to any specific line item in a city budget. The participatory budgeting process is one way to find funding for such ideas, and involve the public in thinking them through. But no way should we be voting on whether to make an elementary school or playground safer, or worse, deciding which kids deserve this safety more.

Perhaps, then, the problem is not necessarily with participatory budgeting as a concept, but with its broader, unequal, and stingy context, in which so many basic needs are left unmet. The frisson of making proposals and choices may have its place, but let's please tax the rich and fix everyone's sink.

Participatory Budgeting: Why Not Fix Everyone's Sink? Liza Featherstone. June 5, 2018. Courtesy of the author.

<https://shelterforce.org/2018/06/05/participatory-budgeting-why-not-fix-everyones-sink/>

Debate Carousel Handout

<p>1. Give your opinion and give your rationale.</p> <p>Record your opinion and explain your reason for it.</p>	<p>2. Add a supporting argument.</p> <p>Read your classmate's response. In this box, add another reason that would <i>support</i> your classmate's response.</p>
<p>3. Add an opposing argument.</p> <p>In this box, record a reason that might be used to argue <i>against</i> what is written in box #1 and #2.</p>	<p>4. Add your "two cents."</p> <p>Read what is written in the three boxes. Add <i>your</i> opinion and <i>your</i> reason for it in this box.</p>

Suggested Activity 8

Participatory Budgeting in the Community

Objective:

- Students identify the main components of participatory budgeting and analyze community needs and the process in addressing those needs.

Materials:

- *PBNYC 2018 Ballot for City Council District 38*
- *POV Short Public Money Short Film*: <http://www.pbs.org/pov/publicmoney/>
- Public Money Discussion Questions

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government
- Managing your money
- Strategies to achieve long-term goals
 - Budgeting

Next Generation Learning Standards:

RH 1: Cite specific textual evidence to support analysis of primary and secondary sources, attending to such features as the time and place of publication, origin, authorship, etc.

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate summary that makes clear the relationships among the key details and ideas.

Suggested Activity 8

Activity:

- Students examine the *PBNYC 2018 Ballot for City Council District 38* and record three observations they make about the summaries accompanying each proposal.
- Students share their findings with a partner and identify one notable observation to share with the rest of the class.
- Teacher facilitates a class discussion by asking:
 - What is the budget provided for each proposal?
 - If the total allocation for the community participatory budgeting program was \$1 million, how many of these initiatives could be fully funded?
 - How should we determine which initiatives get funded and which ones should not be funded?
 - How does voting on these initiatives reflect the will of the public?
- Students watch the PBS POV Public Money Short Film <https://www.amdoc.org/watch/publicmoney/>
- Students review the film with their group members and answer the discussion questions on the *Public Money Discussion Questions* student handout.
- Students identify all projects proposed (security cameras, community center at the public library, community garden, basketball courts, etc.) in the video and discuss the following questions for each proposal:
 - What community problem does this project solve? What needs does it fulfill?
 - Who does this project benefit in the community?
 - Is this project a quick fix or a deep solution? Explain.

Wrap Up:

- Teacher wraps up the lesson by asking students to briefly discuss what they would have voted for if they lived in the Sunset Park Community.

Extension Activities:

- Students visit the New York City Council Participatory Budgeting website to see a list of all of the projects that were and were not funded during the seventh PB cycle and engage in a discussion as to why they believe some were not funded.
- Students brainstorm a list of possible projects that they would like to see implemented in their school and engage in research to identify possible costs of implementation.

Suggested Activity 8

Additional Resources:

- New York City Council Participatory Budgeting: <https://council.nyc.gov/pb/cycle-7-results/>
- Participatory Budgeting Project. “myPB” 2018 <http://myPB.info>
- PBS Point of View: Public Money Lesson Plan: <https://www.amdoc.org/engage/resources/student-engagement-through-participatory-budgeting/overview/>

NYC PB Ballot for District 38



Official Ballot - Participatory Budgeting NYC 2018
Council Member Carlos Menchaca, District 38



Decide How To Spend Your District's Budget



- You may cast up to 5 votes
- If you make a mistake, ask for a new ballot
- Do not fold the ballot



EXAMPLE
 Make an X in the box to select an option

Education

- 1. P.S. 94 Security Camera**
 – 5010 6th Avenue, Sunset Park (\$450,000)
 Installing security camera system at the premise of the school to ensure students' safety.
- 2. P.S. 503/506 Gym AC Wiring and Safety Panel**
 – 330 59th Street, Sunset Park (\$525,000)
 Install AC wiring and safety panel in the gym, used by over 2000 students.
- 3. P.S. 676 Library Multimedia Center**
 – 27 Huntington Street, Red Hook (\$256,810)
 Renovating the old school library and add a multimedia center equipped with modern technology.
- 4. P.S. 676/Summit Academy STEAM Design Studio**
 – 27 Huntington Street, Red Hook (\$124,866)
 A design studio that students can use various machines from 3D printer to sewing machine to create their art projects.
- 5. Summit Academy School Science Lab**
 – 27 Huntington Street, Red Hook (\$250,000)
 A quality science lab will help ensure the students get the proper exposure to science laboratory techniques.
- 6. SAV Technology for School Auditoriums**
 – P.S.1, P.S.169, P.S.105, M.S.136, M.S.821 (\$600,000)
 Improve theatrical experience for our students with an upgrade on audio and visual technology for school auditoriums.
- 7. Better Technology for Classrooms & Libraries**
 – Sunset Park and Red Hook (\$750,000)
 Tech equipment for South Brooklyn High School, P.S. 105, M.S. 821, P.S. 503 and P.S. 371K.
- 8. Improve Auditoriums for Neighborhood Schools**
 – Sunset Park (\$800,000)
 Renovate auditoriums by improving and repairing stages, lighting and chairs for P.S. 1, P.S. 169 and M.S. 821.

Parks & Recreation

- 9. Plant 100 New Trees on Third Avenue**
 – Along Third Avenue and the Gowanus Expressway (\$180,000)
 Plant 100 new trees to reduce air pollution from the Gowanus Expressway, and improve public health for the community.
- 10. Repair Entrance Steps of Sunset Park**
 – 5th Avenue between 41st and 44th Streets (\$500,000)
 Replace broken steps at park entrances on 41st and 44th Streets to make safer and wheelchair/stroller accessible.
- 11. Sidewalk Repair Along Sunset Park**
 – 5th Avenue between 41st and 44th Streets (\$500,000)
 Repair crumbling sidewalk along 5th Avenue between 41st and 44th Streets.
- 12. Rainbow Playground Upgrade**
 – 6th Avenue and 55th Street, Sunset Park (\$500,000)
 Renovation of Rainbow Playground, updating the children's play area and redesigning the seating area.

Streets

- 13. Road Re-pavement in Community Board 10 and 12**
 – Sunset Park, Bay Ridge and Borough Park (\$250,000)
 Repairing road in Community Boards 10 and 12.
- 14. Road Re-pavement in Community Board 6**
 – Red Hook (\$250,000)
 Repairing roads in Red Hook.



Suggested Activity 8

Public Money Discussion Questions

Instructions: Review the film with your group by answering the following discussion questions:

1. What is Participatory Budgeting (PB)? Why are cities around the world investing in the PB process?
2. What did the organizers mean when they said, “Budgets are the essence of what government does...”?
3. What did the residents hope to accomplish by participating in PB? What did they have in common?
4. Sunset Park is a diverse neighborhood, but not entirely integrated. How was that reflected in the PB process? What strategies might help participants collaborate across language and cultural differences?
5. What aspects of the PB process were most successful? How would you improve, refine or change the process if you were a participant?
6. How could Participatory Budgeting improve your community’s relationship with your own local government? What role should youth play in Participatory Budgeting?
7. What questions do you have about the PB process?

Suggested Activity 9

Participatory Budgeting in Schools

Objective:

- Students identify the components of participatory budgeting and consider how participatory budgeting is applied within schools.

Materials:

- *Public Money: My Two Cents Discussion Exercise*
- *Public Money: What's the Big Idea*
- 20 sheets of large chart paper and sticky notes

NYC Social Studies Scope & Sequence 9-12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

RH 1: Cite specific textual evidence to support analysis of primary and secondary sources, attending to such features as the time and place of publication, origin, authorship, etc.

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate summary that makes clear the relationships among the key details and ideas.

Suggested Activity 9

Activity:⁷

- Teacher writes the following questions on the board and instruct students to write a brief response for three to five minutes:
 - Who makes the decisions about how money is spent in our school?
 - What role could students play in the decision-making process?
 - What would a successful participatory budgeting look like in a school community?
- Teacher distributes two “pennies” from *My Two Cents Discussion Exercise* and has students write their names on each sheet.
- Teacher explains that, as the lesson continues, just like participatory budgeting we want to make sure that everyone’s voice is heard and that each person can share their “two cents.” Each time a student participates in a discussion, they can hand in one of their pennies. By the end of the lesson everyone should have spent their pennies.
- Students share their responses and briefly discuss the following question using the Popcorn Sharing Method described in *My Two Cents Discussion Exercise*:
 - Why would it be beneficial for the school community if students helped decide how our school budget is spent?
- Teacher distributes sticky notes around the classroom and reviews the instructions below. Give students three to five minutes to brainstorm improvements that could be made to benefit their school community and have them write one idea per sticky note.
- Teacher divides class into groups and students work together to categorize project ideas into similar themes and post it on chart paper. (e.g., school beautification, recreation, classroom materials, environment and sustainability).
- Teacher facilitates discussion and share out on the different project categories and consolidates categories through large group discussion. Once categories have been agreed upon teacher labels chart paper accordingly. Students identify and place their project post-it note in the agreed upon category.
- Teacher assigns one category to each group of students to analyze and evaluate the projects using *Public Money: What’s the Big Idea?* Each team selects a note-taker, then discusses and organizes the project suggestions using the prompts on page 1 of the handout. Student groups then select a project to explore and use *Public Money: What’s the Big Idea?* page 2 to describe and evaluate the benefit of this plan.

7 Activities in this lesson are adapted from Allison Milewski, “Student Engagement through Participatory Budgeting Activities,” American Documentary Inc., 2018, <https://www.amdoc.org/engage/resources/student-engagement-through-participatory-budgeting/activities/>.

Suggested Activity 9

NOTE TO TEACHERS: A team might decide they do not like the project suggestions they have to choose from. If so, explain that the goal of this activity is to practice the process of brainstorming, designing, presenting, and analyzing a project. Students might find that practicing with a random project idea can free them up to experiment and think out of the box. Later in the lesson, everyone will have the opportunity to develop their own project ideas.

Wrap-up:

- Teacher reconvenes the class for a brief review and reflection using the following prompts, as needed (remind students who still have their Two Cents to participate in the discussion):
 - What surprised you most during the activity?
 - What questions and suggestions were most helpful when evaluating project ideas?
 - What project(s) are you most enthusiastic about? Why?
 - If you wanted to implement one or more of these school improvement projects, what might some of the next steps be?
 - If you wanted to implement one or more of these school improvement projects, how could you fund them?

Additional Resources:

- PBS Student Engagement through Participatory Budgeting lesson plan:
<https://www.amdoc.org/engage/resources/student-engagement-through-participatory-budgeting/lesson-details/>

My Two Cents Discussion Exercise

Overview

This exercise helps to make sure that all students contribute to the classroom discussion in an active and inclusive way:

Step 1: Prep Materials

Cut out small squares of paper (two-by-two inches). Using two different colors for the pieces of paper works well for tracking student participation (sticky notes can also be used). To add some flair, print an image of a penny on each square!

Step 2: Explain

Give each student two pieces of paper. Have them write their names on each sheet. Explain that every time students participate in the discussion, they hand in one of their sheets. Students can participate more than twice in class discussions, but be sure to periodically reach out to students who haven't spent all of their pennies.

Step 3: Discussion

Every time students participate in the discussion, have them hand in a sheet of paper with their names on it. If students have no sheets left, they have to wait until all the other students have handed in their sheets. Once all the sheets have been handed in, you can distribute new sheets.

Step 4: Evaluation

Review the papers to make sure that all students have contributed to the discussion. You may want to assign a point system to the sheets to help grade class participation.

Popcorn Share:

- After you pose a question, give the class time to think about their responses.
- When you call "Popcorn" the students should quickly and voluntarily pop up from their chairs one at a time to share a response.
- Have seated students record the responses and prepare feedback.
- Follow with a brief discussion.

POV: PUBLIC MONEY, Teacher Handout A: Discussion Activities

<https://www.pbs.org/pov/downloads/2018/pov-publicmoney-lesson-plan-handouts.pdf>

Suggested Activity 9

What's the Big Idea?

Instructions: Discuss and organize the project suggestions using the following prompts. Record notes, feedback and ideas as your team analyzes the project suggestions.

1. Which projects solve a problem?
2. Which projects provide enrichment?
3. Which projects directly benefit the whole community?
4. Which projects support a smaller group of students who have a critical needs or are underserved by current resources?
5. What processes would each project involve? <ul style="list-style-type: none">• Fixing what already exists:• Using current resources in a new way:• Introducing entirely new resources, projects, or programs:• Hiring or partnering with outside organizations, specialists, and/or service providers:
6. Which projects are most feasible?

POV: PUBLIC MONEY, Student Handout A: What's the Big Idea?

<https://www.pbs.org/pov/downloads/2018/pov-publicmoney-lesson-plan-handouts.pdf>

Suggested Activity 9

What's the Big Idea?

Instructions: Collaborate with your group to describe and evaluate your project by responding to the following questions.

1. Project Title and description of your project:
2. What problem(s) does this project solve or what needs does it fulfill?
3. How does this project benefit the school?
4. Is this project focused on a majority group or minority group of students? How does the entire school community benefit by supporting this group?
5. Is this project a “quick fix” or will it be sustainable for future students? Will it have recurring costs in the future? Explain.
6. What resources do you already have for this project? List as many as you can think of. (For example: human resources, materials, training, teachers, outside partners, services, etc.)
7. What resources do you need? List as many as you can think of.
8. Imagine you are presenting this project to raise money. What would be your three sentence “pitch”? (Note: a “pitch” is an inspiring presentation of a project idea to potential investors.)

POV: PUBLIC MONEY, Student Handout A: What's the Big Idea?

<https://www.pbs.org/pov/downloads/2018/pov-publicmoney-lesson-plan-handouts.pdf>

Suggested Activity 10

Participatory Budgeting

Objective:

- Students review the participatory budgeting for the semester.
- Students identify the structure of the organization and review the timeline.

Materials:

- *Participatory Budgeting Overview for Students*, see p. 5

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Suggested Activity 10

Activity:

- Students receive a copy of the *Participatory Budgeting Overview* (for students).
 - Teacher divides students into Individual Research Committees based on interest and explains the role of each group:
 - **Individual Research Committees:** Each research committee nominates team members to take on the following roles: 1. Budget Delegates, and 2. Committee Chairperson. (The same student can be nominated for both positions). Research Committees can be formed based on categories related to the initial proposed ideas for change. Sample categories to spark creativity can include:
 - Academic Success
Planners for students, Bilingual dictionaries, Pencil Cases, and Backpacks
 - Dropout Prevention
Student accountability partners, text reminder system
 - Celebrating the History and Culture (Community) of School X
Supplies for mural, resources for school wide multicultural day celebrations
 - Campus Improvement
Labeled recycled bins, installation of water bottle fill station
 - Student Empowerment
Creation of student store, inspirational banners to be displayed
 - Students nominate one representative to be the Committee Chairperson who also joins the Steering Committee:
 - **Steering Committee:** The committee that establishes rules and guidelines for the duration of the project. Members act as liaisons between the working committee groups, school administration, experts, and other community members in communication and resource allocation. The members are the Committee Chairs of each of the Individual Research Committees.
- NOTE TO TEACHERS:** This activity can consist of multiple sessions based on the needs of students for brainstorming project ideas.
- Teacher explains that the proposed idea must not exceed a budget of \$2,000 and that students need to engage in research to determine the possible costs for implementing their ideas.
 - Students start to brainstorm ideas within the classroom.
 - The Steering Committee creates surveys to distribute to other people around the school.
 - The Steering Committee establishes a schedule/timeline for the committees to follow, collects survey results, categorizes them and creates committees based on the determined criteria, and identifies heads of committees.

Suggested Activity 10

- The Individual Research Committees are limited to one project each that is then presented prior to being voted on the day established by the Steering Committee
- Students brainstorm possible project ideas in small groups and share their thoughts with the class.

Wrap-up:

- Individual Research Committees establish norms for structuring their meeting sessions and can create a Google group or poster that details guidelines and roles for their meetings.

Extension Activities:

- Teacher and students collaborate to craft professional communications including soliciting resources, research queries, and follow-up emails.
- Students research other participatory budget projects that have been funded in other schools for ideas.
- Students research city agencies and/or shareholders including local businesses that could be utilized as experts to be consulted.
- Students closely read and annotate *East Harlem: Of 500 Budget Ideas, a Few Survive* to better understand the feasibility of participatory budgeting projects.

Additional Resources:

- Green Book Online:
<http://a856-gbol.nyc.gov/GBOLWebsite/GreenBook/Online>
- East Harlem: Of 500 Budget Ideas, a Few Survive:
<https://citylimits.org/2012/02/29/east-harlem-of-500-budget-ideas-a-few-survive/>

Suggested Activity 11

Surveying for Public Opinion

Objective:

- Students analyze the role of surveys in gauging public opinion to refine project ideas.

Materials:

- *Students School Perception Survey*
- *Student Survey Template*
- *2018/2019 Participatory Budgeting Has Begun* website: *2018/2019*
<http://www.stephenlevin.nyc/pbnyc/>

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

RH 2: Determine the central ideas or information of a primary or secondary source; provide an accurate, objective summary of the source distinct from prior knowledge or opinions.

RH 7: Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.

Activity:

- Teacher asks students to define what a **survey** is and the following vocabulary words: **purpose**, **respondents**, **questions**, and **format** as they relate to survey design.
- Students work in groups to analyze *Students School Perception Survey* to identify the purpose of the survey, the categories of topics, and the format of questions.

Suggested Activity 11

- Teacher leads a whole class discussion by asking the following questions:
 - What is the purpose of the survey?
 - What is your opinion of the survey you just analyzed?
 - Are all of the questions appropriate?
 - What changes would you make to this survey if you were conducting the research yourself?
- The Steering Committee develops a survey with categories similar to the *Survey Template* using ideas generated in Suggested Activity #9.
- Students can choose to use the sample categories below, but are not limited to these suggestions:
 - Academic Success
 - Dropout Prevention
 - Celebrating the History and Culture of School X
 - Campus Improvement
 - Student Empowerment
- Research Committees work to establish their own norms, protocols, and roles for research as the Steering Committee completes the development of the survey.
- Students create a web-based survey form through online platforms such as Google Forms, SurveyMonkey or surveyPlanet and distribute the web-based survey to students throughout the school.

NOTE TO TEACHERS: Each teacher’s class surveys should be given to a different selection of students within the school. Student surveys should include a question that solicits additional ideas for the distributions funds. Students may use past funded proposals such *2018/2019 Participatory Budgeting Has Begun* in order to understand the kinds of projects that were implemented under a \$1 million budgetary limit.

Wrap-Up:

- Students work in pairs to identify possible challenges to organizing survey responses, particularly survey questions that are not multiple choice and that require analyzing written responses for possible project ideas.

Extension Activities:

- Students closely read and annotate *Participatory Budgeting Hits New York City* to identify steps in gathering ideas for participatory budgeting allocation in community districts.
- Students examine data from Participatory Budgeting Project’s “myPB” 2018 website to identify areas and projects that voters chose to allocate funds.

Suggested Activity 11

Additional Resources:

- Participatory Budgeting Project. “myPB” 2018 <http://myPB.info>
- Participatory Budgeting Projects:
<https://data.cityofnewyork.us/City-Government/Participatory-Budgeting-Projects/wwhr-5ven>

Suggested Activity 11

Students' School Perception Survey

Thank you for taking the time to fill out this important survey regarding the school environment. The survey asks what you think about the school, issues you care about, and ideas for next steps.

The survey will take about 10 minutes to complete. Your honest feedback will help us find ways to improve our school. This is an anonymous survey, so no one will know how you answered the questions.

Survey (circle the answer that best describes you):

1. Grade: **9th** **10th** **11th** **12th**
2. A student council member? **Yes** **No**
3. Would you be willing to join a committee to make improvements to the school? **Yes** **No**

	How important is it to you that...						Why?
	Not	←	-	-	-	→	
4. students have a say in the way the school is run?	0	1	2	3	4	5	
5. students care about helping the administration make decisions about the school?	0	1	2	3	4	5	
6. our school provides materials necessary for learning?	0	1	2	3	4	5	
7. our school is able to provide the necessary tools to learn?	0	1	2	3	4	5	
8. the school has the necessary tools to support your education?	0	1	2	3	4	5	
9. you know decisions are made in the school?	0	1	2	3	4	5	
10. students in our school feel supported by school staff?	0	1	2	3	4	5	

Suggested Activity 11

Survey Template B

Directions: Read the sample category of a survey question below and brainstorm a list of categories and ideas for a participatory budgeting project to present to fellow students in the school. You will then digitize your survey using a Google Form (or other digital survey creation software).

Issue (How would you spend \$2,000 to improve academic success at our school?)	How important is it to you that... Not ← - - - - → Very	Why?
Example: Category: <i>Academic Success</i> Idea: <i>Hire an outside tutor once a week for a year for STEM classes.</i>	0 1 2 3 4 5	
Category: Idea:	0 1 2 3 4 5	
Category: Idea:	0 1 2 3 4 5	
Category: Idea:	0 1 2 3 4 5	
Category: Idea:	0 1 2 3 4 5	

Suggested Activity 12

Category:		
Idea:	0 1 2 3 4 5	
Category:		
Idea:	0 1 2 3 4 5	
Category:		
Idea:	0 1 2 3 4 5	
Category:		
Idea:	0 1 2 3 4 5	
Category:		
Idea:	0 1 2 3 4 5	

What other issues do you think could be addressed with a \$2,000 budget?

Suggested Activity 12

The Project Begins

Objective:

- Students assess survey data and begin to research the costs involved with their proposal.

Materials:

- *Student Surveys from Suggested Activity #11*
- *Feasibility Evaluation*
- *Research Checklist*
- Computer Access

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Next Generation Learning Standards:

HST 5: Conduct short research projects to answer a question (including a self-generated question by the end of grade 8), drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.

WHST 6: Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source by applying discipline-specific criteria used in the social sciences or sciences; and quote or paraphrase the data/accounts and conclusions of others while avoiding plagiarism and following a standard format for citation.

WHST 7: Draw evidence from informational texts to support analysis, reflection, and research.

Suggested Activity 12

Activity:

- The Steering Committee reviews the the data generated in Suggested Activity #11 and removes impractical initial proposals from consideration to narrow the ideas generated in each category across the groups in the class.
- As the Steering Committee sifts through data, the Research Committees meet to begin preliminary research about the possible costs and factors that need to be considered to implement their proposed idea.
- Research Committees evaluate possible projects along four parameters on the *Feasibility Evaluation*:⁸
 - Operational Feasibility
 - *Is the problem worth solving?*
 - *Are many students concerned about the problem?*
 - Technical Feasibility
 - *Is the solution practical?*
 - *Are there other avenues to solve the issue already in place?*
 - Economic Feasibility
 - *What is the cost of implementing the solution?*
 - *What are the ongoing costs of the solution?*
 - Assessing the Outcome
 - *Who will benefit from the solution?*
 - *How can you tell if the benefits outweigh the costs?*

NOTE TO TEACHERS: Teacher circulates during the activity in order to remind students that they are meant to narrow the ideas provided by the Steering Committee, discarding those that are less feasible, in order to arrive at one idea to be developed into a proposal.

Wrap Up:

- Students present their findings with another group and evaluate the feasibility of their ideas thus far. Students use the *Research Checklist* to monitor progress.

⁸ Adapted from <https://cs.uwaterloo.ca/~apidduck/CS330/W04/Lectures/cb>

Suggested Activity 12

Extension Activities:

- Students assess data from *A People's Budget A Research and Evaluation Report on Participatory Budgeting in New York City* to identify committees created in New York City at the community level, how ideas were collected and recommendations for improvement to use in their own projects.
- Students assess data from *Cambridge Community Members Open Data* to identify suggestions made by community members and practice assessing the feasibility of suggestions based on the City of Cambridge's budget.

Additional Resources:

- People's Budget A Research and Evaluation Report on Participatory Budgeting in New York City: https://cdp.urbanjustice.org/sites/default/files/CDP.WEB.doc_Report_PBNYC_cycle4findings_20151021.pdf
- Cambridge Community Members Open Data: <https://data.cambridgema.gov/Budget-Finance/Participatory-Budgeting-Ideas-Submitted-by-Communi/54vd-wdqj>

Suggested Activity 12

Feasibility Evaluation

Operational Feasibility	<p>Why is the problem worth solving?</p> <p>Are many students concerned about the problem?</p>
Technical Feasibility	<p>Why is the solution practical?</p> <p>Are there other avenues to solve the issue already in place?</p>
Economic Feasibility	<p>What is the cost of implementing the solution?</p> <p>What are the ongoing costs of the solution?</p>
Assessing the Outcome	<p>Who will benefit from the solution?</p> <p>How can you tell if the benefits outweigh the costs?</p>

Adapted from University of Waterloo, Feasibility and Cost-Benefit Analysis:

<https://cs.uwaterloo.ca/~apidduck/CS330/W04/Lectures/cb>

Research Checklist

Role:

Session No.:

<p>Step 1: Have I completed my assigned task from the last meeting?</p> <p>Insert Task:</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I cannot*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 2: Have I contacted an expert about how to implement my idea for the project?</p> <p>Insert Expert's Opinion:</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I do not know how*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 3: Does the proposed idea currently meet the criteria established in the assignment, including not exceeding a \$2,000.00 budget including labor and materials?</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I do not know how*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 4: Today's Research: <i>(List websites, resources accessed, discoveries, challenges encountered)</i></p>	
<p>Step 5: Team Share Out and Reflection: <i>(What was accomplished today? What tasks still need to be completed during the next session? Who do we need to collaborate with in order to make the idea feasible?)</i></p>	

Suggested Activity 13

Finalizing the Research for the Proposal

Objective:

- Students evaluate the feasibility of their ideas by engaging in a cost-benefit analysis.

Materials:

- *District 38 Participatory Budgeting: The Results Are In*
<https://bklyner.com/district-38-participatory-budgeting-results/>
- *Samantha Case Study*
- Computer Access

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

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- Budgeting

Next Generation Learning Standards:

HST 5: Conduct short research projects to answer a question (including a self-generated question by the end of grade 8), drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.

WHST 6: Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source by applying discipline-specific criteria used in the social sciences or sciences; and quote or paraphrase the data/accounts and conclusions of others while avoiding plagiarism and following a standard format for citation.

WHST 7: Draw evidence from informational texts to support analysis, reflection, and research.

Suggested Activity 13

Activity:

- Teacher projects one of the winning Capital Project Proposals from District 38 (Brooklyn) in 2017 (available at [District 38 Participatory Budgeting: The Results Are In](#)) and asks students to explain why that district's proposals may or may not work for their school-based proposal in terms of its economic, operational, or technical feasibility.
- Students analyze the *Samantha Case Study* to better understand the concept of cost-benefit analysis and how to weigh different options when implementing a budget.
- Teacher facilitates a class discussion by asking the following question:
 - Describe the three options Samantha can take as it relates to her lawn care business.
 - What are the costs to Samantha for each choice?
 - Which choice would you make in her position? Why?
 - Why do you need to consider both the costs and benefits of your project?
 - To what extent would doing a cost-benefit analysis make it more likely that fellow students will vote for your project to be funded by the school?
- Students work in their Individual Research Committees to finalize their research into the costs and benefits of their project idea. Students continue to use the *Research Checklist* to monitor progress.

Wrap Up:

- Students send one representative to a different group to receive warm and cool feedback about their project ideas.

Extension Activities:

- Students present their findings to the student government organization, the principal, or the school leadership team to elicit feedback before moving forward with their project idea.
- Students email experts or other professionals who can help them determine the feasibility of their projects or offer advice as to how something similar had been implemented in the past on a small or large scale.
- Students contact their local city council member to present their idea and ask for suggestions on how to make it feasible for their school or for the district in which they live.
- Students collaborate to design an online ballot with each project proposal for a class vote to see which project moves forward.

Suggested Activity 13

Additional Resources:

- *District 22 Participatory Budgeting Project Ballot.*
<http://council.nyc.gov/costa-constantinides/wp-content/uploads/sites/23/2017/02/2017-ballot.pdf>

Samantha Case Study

Samantha was sick and tired of not having enough money to buy the things she wanted. She expressed her frustration to her father, declaring “I need to make some money. I want to start my own business!” Her father was impressed by her determination, and he quickly saw an opportunity to teach his daughter some money management and entrepreneurship skills. He suggested that she check out the old lawn mower in the garage. “The motor died about a month ago, so it’s been sitting there unused. If you can fit it, it’s yours. And, with a working lawn mower, you would be steps away from being a business owner.”

Samantha didn’t know how to fix engines, but she immediately remembered her neighbor Doug, a retired machanic who might be able to get her lawn mower in working order free of charge. As hoped for, Doug was happy to help, and he quickly identified the problem: the mower needed new parts. But, as Samantha quickly learned on her trip to the hardware store, the new parts cost money—\$44 to be exact. The whole reason for starting this business was because Samantha didn’t have enough money in the first place!

Samantha didn’t want to give up so easily though. Maybe spending some money up front would be worth it if she could have a money-making business in the long run. When she got home, Samantha asked her father for the money to purchase the lawn mower parts. Her father said he would loan her half of the money if she promised to pay him back. Samantha went up to her room and scraped together \$22 from her piggy bank, her change purses, and a birthday card from Grandma. She agreed to take her father’s load for \$22.

A few days later, Doug had fixed the lawn mower, and Samantha had secured her first client. A family friend named David had agreed to let Samantha mow his lawn for \$20. However, there was another hitch: the lawn mower didn’t have gas! Samantha went back to her father and asked for help purchasing fuel. Her father was impressed that she had gotten the mower running again, and he suggested she buy some lawn bags and a rake to make sure she was totally prepared for her first job. He said he would loan her the \$28 necessary to cover these cost if she paid him back. Excited to get her business up and running, Samantha agreed.

Early the next Saturday, Samantha spent several hours mowing and raking the lawn. Much to her excitement, David presented Samantha with a crisp new \$20 bill. She set up an appointment in two weeks to mow the lawn again. Wow! This would mean another \$20. At this rate, she figured that she would make \$120 mowing the lawn every other week for the next 12 weeks.

Samantha ran home to celebrate her success, her imagination running wild with thoughts of all the things she could now buy—both for herself and for her new business. However, Samantha’s excitement was tempered when she saw a sheet of paper taped on her bedroom with “Samantha Debt To Dad: \$50!” written in big letters. When Samantha went to her father, she asked when she had to pay him back. Her father gave her three options:

Suggested Activity 13

1. Samantha could pay all of the \$20 for each lawn mowed until the debt is paid off.
2. Samantha could pay him only \$10 for each lawn mowed until the debt is paid off, but her father would charge her 5% interest on her debt every time she mowed a lawn. (In other words, he would add \$1 to her debt for each lawn mowed.)
3. Samantha could pay him nothing at all, but only if Samantha agreed to make him a part-owner of the business. As a part-owner of the business, Samantha's dad would have a say in the business and receive 25% of all future earnings made through the lawn mowing business.

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For more information visit EconEdLink, www.econedlink.org, or call 800-338-1192.

Suggested Activity 13

Samantha's Debt Options

Cost/Benefit Analysis: A process of examining the advantages (benefits) and disadvantages (costs) of each available alternative in arriving at a decision.

Directions: With your group, fill out the timeline, benefits, and costs for each of Samantha's debt repayment options. After you've completed the chart, decide as a group which option you'd choose if you were Samantha.

	Option #1: Pay Dad \$20 for each lawn mowed	Option #2: Pay Dad only \$10 for each lawn mowed, but 5% interest for each lawn mowed	Option #3: Pay Dad nothing but give father 25% of all future earnings
Time To Pay?			
Benefits (Advantages)			
Cost (Disadvantages)			
FINAL DECISION: If you were Samantha, which option would you choose? Why?			

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Suggested Activity 13

Samantha's Debt Options—Answers

Cost/Benefit Analysis: A process of examining the advantages (benefits) and disadvantages (costs) of each available alternative in arriving at a decision.

Directions: With your group, fill out the timeline, benefits, and costs for each of Samantha's debt repayment options. After you've completed the chart, decide as a group which option you'd choose if you were Samantha.

	Option #1: Pay Dad \$20 for each lawn mowed	Option #2: Pay Dad only \$10 for each lawn mowed, but 5% interest for each lawn mowed	Option #3: Pay Dad nothing but give father 25% of all future earnings
Time To Pay?	Three lawn mowing (with only \$10 given on the last mowing)	Six lawn mowings (five jobs will pay off the original debt, but Samantha will need to mow one more lawn in order to cover the additional \$1 in interest per lawn mowed)	No time at all
Benefits (Advantages)	Be debt-free very quickly Samantha won't have to pay any additional money beyond the \$50	Be debt-free somewhat quickly For each lawn mowed, Samantha will have some money for personal or business expenses	Be debt-free instantly Samantha can spend all of the \$20 she earned mowing her first lawn, and she can spend all of her future earnings on personal or business expenses If her father is a part owner, he may continue to contribute money to cover business expenses
Cost (Disadvantages)	Samantha won't have any money for personal or business expenses for the first three lawn mowings	Does not get rid of debt as quickly as with Option #1 or Option #3 Will end up paying her father more money than she originally borrowed Cannot use all of her earnings from the mowings for personal and business expenses because she will be repaying her debt	Gives up 25% of future earnings—she will only get to keep \$15 per lawn mowed instead of \$20 Gives up full ownership. Samantha can't make all decisions about the business by herself.
FINAL DECISION: If you were Samantha, which option would you choose? Why?			

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Suggested Activity 14

Creating the Presentation

Objective:

- Students design a presentation that illustrates the scope, efficacy, and feasibility of their project proposal using a trifold poster board that can be presented to the entire school.

Materials:

- *NYC PB Ballot for District 38* (introduced in Suggested Activity #8, p. 54)
- Trifold boards
- Scissors, paper, adhesives, markers
- Computer access
- Student or Teacher created Voter Ballots

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Political and Civic Participation 12.G4

There are numerous avenues for engagement in the political process, from exercising the power of the vote, to affiliating with political parties, to engaging in other forms of civic participation. Citizens leverage both electoral and non-electoral means to participate in the political process.

Next Generation Learning Standards:

11-12SL4: Present claims, findings, and supporting evidence, conveying a clear and distinct perspective; alternative or opposing perspectives are addressed; organization, development, substance, and style are appropriate to task, purpose, and audience.

Suggested Activity 14

11-12SL5: Make strategic use of digital media and/or visual displays in presentations to enhance understanding of findings, reasoning, and evidence, and to add elements of interest to engage the audience.

Activity:

NOTE TO TEACHERS: For this activity students or teacher should make voter ballots to give to the class. Teacher can use *NYC PB Ballot for District 38* (see p. 57) as a model.

- Teacher distributes trifold poster boards while the Individual Research Committees spend five minutes organizing all of their notes.
- Students identify how they want to arrange their research materials (e.g., visuals, data, and correspondence with experts) on their trifold board to best present their findings to a school wide audience while the teacher reminds students of task, audience, and purpose of designing the presentations.
- Students create their presentations with available materials
- Teacher displays the finished presentations in a manner conducive to a gallery walk.
- Students participate in a gallery walk, offering their classmates warm and cool feedback on an exit ticket to help finalize any last revisions that need to be created before presenting their finished projects to the school.
- Using the ballots created by the teacher, the students vote for the winning project idea that will represent their class.

NOTE TO TEACHERS: If there are multiple teachers who have more than one class taking part in the Participatory Budgeting project then teachers should have classes narrow down their options to one. Teachers may need to provide classes with additional ballots accordingly.

Wrap-Up:

- Students draft an email to an expert who can identify possible issues with implementing the projects within the school.

Extension Activities:

- Students assess professional emails and practice drafting emails appropriate for the professional community.
- Students photograph their trifold boards and post them on the school website in advance of the presentations to inform other members of the school community of their project ideas.

Suggested Activity 14

- Students create a multimedia presentation to present their projects ideas.
- Students can create an advertising campaign to inform other students about their project and to encourage them to vote for their respective proposal.

Additional Resources:

- *Email Etiquette*
https://owl.purdue.edu/owl/general_writing/academic_writing/email_etiquette.html
- *Tri-fold Project Presentation*
<https://www.coriell.org/1/About-Us/Education/Coriell-Institute-Science-Fair/Creating-Your-Project-Tri-Fold-Board>

Suggested Activity 15

Presenting the Projects

Objective:

- Students finalize and present their proposals for participatory budgeting project to the administration and student body.

Materials:

- *NYC PB Ballot for D38* (introduced in Suggested Activity #8, p. 57)
- PB Proposal Projects
- Presentation Checklist
- Voter Ballots

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government

Managing your money

- Strategies to achieve long-term goals
- Budgeting

Political and Civic Participation 12.G4

There are numerous avenues for engagement in the political process, from exercising the power of the vote, to affiliating with political parties, to engaging in other forms of civic participation. Citizens leverage both electoral and non-electoral means to participate in the political process.

Next Generation Learning Standards:

1-12SL4: Present claims, findings, and supporting evidence, conveying a clear and distinct perspective; alternative or opposing perspectives are addressed; organization, development, substance, and style are appropriate to task, purpose, and audience.

11-12SL5: Make strategic use of digital media and/or visual displays in presentations to enhance understanding of findings, reasoning, and evidence, and to add elements of interest to engage the audience.

Suggested Activity 15

Activity:

NOTE TO TEACHERS: This activity is for the students who have had their proposals approved by the students in their classes and should be led by a teacher leader. A member of the Steering Committee designs voter ballots to administer to the student body or school community. Be creative but clear! The *NYC PB Ballot for District 38* (see p. 57) can serve as a model for the ballots.

- Students from the Individual Research Committee with the winning proposal review their tri-fold boards and revise their projects using peer-generated feedback.
- Students choose two representatives to serve as speakers to present the proposal to either the student body in a setting resembling a science fair and/or the student leadership team with the administration.
- Students practice their presentation utilizing the *Presentation Checklist*.
- Students finalize the presentation and present to the school.

Wrap-Up:

- Presenters distribute voting ballots to the greater student body to identify the winning proposal.

Extension Activities:

- Students compose a reflection piece to identify strengths and weaknesses of the presentation process.
- Students contact community council person to expand Participatory Budgeting project to other schools in their community.

Additional Resources:

- *Tri-fold Project Presentation*
<https://www.coriell.org/1/About-Us/Education/Coriell-Institute-Science-Fair/Creating-Your-Project-Tri-Fold-Board>
- *Real Power? Real Money? A Reflection on Participatory Budgeting in New York.*
<http://solidarityresearch.org/2016/12/real-power-real-money-reflection-participatory-budgeting-new-york/>

Suggested Activity 15

Presentation Checklist

Name:

Date:

Role:

Session No.:

<p>Step 1: Have I completed my tri-fold?</p> <p>Insert Task:</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I cannot*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 2: Does my tri-fold contain relevant information and is it visually attractive?</p> <p>Insert Expert's Opinion:</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I do not know how*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 3: Have I created a proposal speech of a minimum of 4 minutes in length that is clear, informative, meets the project requirements, and is engaging?</p>	<p>Check One</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>No Yes I do not know how*</p> <p><i>*If you choose this option, please seek out your teacher or committee chairperson.</i></p>
<p>Step 4: Today's Feedback:</p>	
<p>Step 5: Team Share Out and Reflection: <i>(What was accomplished today? What tasks still need to be completed before presentation? How did we integrate the feedback provided by peers, SLT, and other community members?)</i></p>	

Suggested Activity 16

Project Reflections

Objective:

- Students reflect on the process of participatory budgeting and offer advice for the following cohort of students.

Materials:

- *Student Reflection Handout*
- *Ways to Stay Civically Involved*

NYC Social Studies Scope & Sequence 9–12:

Finance and Personal Finance 12.E1b

- The role of finance in business and government
- Managing your money
- Strategies to achieve long-term goals
 - Budgeting

Next Generation Learning Standards:

WHST 4: Write responses to texts and to events (past and present), ideas, and theories that include personal, cultural, and thematic connections.

Activity:

- Students review the goals and the process of participatory budgeting established by the school.
- Students are arranged into pairs and work collaboratively to generate warm and cool feedback about their experiences in the participatory budgeting process and how they would approach the process differently in the future.
- Students complete their reflection by completing the *Student Reflection Handout*.

Suggested Activity 16

Wrap-Up:

- Students share their reflection with the whole class.
- Students discuss ways they can continue to be engaged in their communities. Students then review *Ways to Stay Civically Involved*.

Extension Activities:

- Students work in group to develop a streamlined process of participatory budgeting to be used in a future class.
- Students write letters with advice for future classes who take part in participatory budgeting.
- Students develop a short action plan to introduce participatory budgeting in their local community.

Additional Resources:

- *Participatory Budgeting Project*. Guide to Participatory Budgeting in Schools. v1.1, 2017.
www.participatorybudgeting.org/how-to-start-pb/pb-in-schools/
- *Trent University, Reflective Writing*
<https://www.trentu.ca/academicskills/documents/Reflectivewriting.pdf>

Suggested Activity 16

Student Reflection Handout

<p>Provide at least two pieces of positive feedback you could give about the participatory budgeting process.</p>	
<p>Provide at least two recommendations you make for the next time the school participates in the project.</p>	
<p>What were some challenges in this process and how were you able to overcome them?</p>	
<p>Did you feel that the process offers students a more democratic voice in the decision-making in their school community? Why or why not?</p>	
<p>Did the participatory budgeting change the way you feel about your school?</p>	
<p>Now that you understand how participatory budgeting works, how likely will you be to get involved with your community or city?</p>	

Ways to Stay Civically Involved

- Get the NYC ID » IDNYC is a government-issued identification card for all residents of New York City who are at least 14 years of age. Any resident of NYC may apply, regardless of immigration status, as long as they provide proof that they reside in New York City. It is free, and provides many benefits, including acting as a library card; a free membership to NYC's museums, zoos, and more; and discounts on a variety of activities, from movie tickets to gyms to supermarkets.
- Getting involved:
 - Join PBNYC in your City Council district—submit ideas, become a Budget Delegate, volunteer as a poll worker, join a District Committee, and vote! If your district doesn't already do PB, reach out to your Council Member and let them know you'd like a say in budget decisions in the area. Learn more about participatory budgeting and see what ideas your neighbors have at <http://council.nyc.gov/pb>.
 - Become a poll worker or poll interpreter in city, state, and federal elections. For both positions you must be at least 18 years old. Poll workers must be U.S. citizens and registered to vote in NYC. Interpreters must be citizens or permanent U.S. residents who live in NYC and are fluent in English as well as Spanish, Chinese, or Korean.
 - Contact your local elected officials about issues in your neighborhood.
 - Get involved with your local community board: community boards are local democratic bodies that address neighborhood needs and concerns. Find information on your community board at www.nyc.gov/html/cau/html/cb/cb.shtml
 - Get involved in education councils: all New Yorkers are eligible to participate in the community education councils (CEC) in each school district and the four citywide education councils. Learn more about how you can support our schools at nycparentleaders.org.
 - Volunteer on a political campaign: even if you are not eligible to register to vote, you can still volunteer your time on a political campaign. Find a list of current candidates at voting.nyc.

Adapted from Student Voter Registration Day 2018 Resource Guide
https://www.nyccfb.info/pdf/2018_SVRD_Resource_Guide.pdf

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