

Budget

Delegate

Orientation



November
2011

Orientation Agenda

Part 1: General Information

- Introductions
- PBNYC Jeopardy
- Introduction to the Budget Delegate Process and Project Development
- Q&A

Part 2: Break into Committees

- Meet Committee members
- Review projects and district map
- Closing and next steps

What are Budget Delegates?

Budget delegates take the ideas developed by community members at the neighborhood assemblies and elsewhere, and turn them into concrete proposals to put on the final ballot.

Over the next few months, you will review these ideas in committees that are organized by types of projects.

Budget Delegate Timeline

Orientation

- Learn about the delegate process

Meeting 1 (November)

- Meet with technical experts
- Review project list and criteria

Meeting 2 (December)

- Prioritize project list
- Assign projects to delegates for site visits

Delegate site visits

- Assess projects and neighborhood need

Meeting 3 (January)

- Report back from site visits
- Pick projects for city agency review

Budget Delegate Timeline

Councilmember staff submits ideas to city agencies for review and pricing

**Meeting 4
(January)**

- **Start developing proposals with available feedback**

**Meeting 5
(February)**

- **Finalize proposals for neighborhood assemblies**

Second round neighborhood assemblies / feedback

**Meeting 6
(Feb/March)**

- **Finalize Ballot for Vote in March**

Budget Delegate Committees

Streets & Sidewalks

e.g. Sidewalk and street repair, speed bumps

Transit

e.g. Bus and subway station improvements

Public Safety, Public Health & Sanitation

e.g. Lighting, trash cans

Education

e.g. Computers and SMART Boards for classrooms

Parks & Recreation

e.g. Dog park, playground equipment

Environment

e.g. Rain barrels, median planters

Culture & Community Facilities

e.g. Public art, libraries

ROLES AND RESPONSIBILITIES:

Budget Delegates

Each Budget Delegate Will:

- **Participate** in regular committee meetings
- **Visit** proposed locations of projects
- Help committee **finalize a proposal** for at least one project for the ballot
- Help **keep the community informed** on the committee's progress, by writing blogs or speaking at community meetings
- Help **present the proposals** at the second round of Neighborhood Assemblies and the voting

ROLES AND RESPONSIBILITIES:

Council Member staff

Council Member Staff Will:

- Provide a **Committee Facilitator** for each budget delegate committee
- Provide **technical feedback** and cost estimates for projects
- Serve as a **liaison** between budget delegates and city agencies
- With District Committee, help **resolve conflicts**

ROLES AND RESPONSIBILITIES:

Committee Facilitator

Committee Facilitators will:

- Coordinate communications and help delegates find the information and resources to evaluate ideas and develop projects
- Help facilitate meetings, ensuring that all delegates are able to participate
- Schedule and book space for committee meetings
- Ensure that notes are taken at each meeting

Committee Support People will NOT:

- **Make decisions** on projects or committee work
- **Write or present** proposals.

CAPITAL ELIGIBILITY

What kinds of things can be paid for with the Capital Budget?

What is the Capital Budget?

- ***The Capital Budget pays for things that last a long time and give larger benefits to the city that last beyond the time of purchase:***
 - Building a firehouse
 - Repaving a road or sidewalk
 - Building a new sewer
- **Paid for with money borrowed from the bond market**

3-Part Capital Eligibility Test

- 1. Cost at least \$35,000**
- 2. Have a “useful life” of at least five years**
- 3. Involve the construction, reconstruction, acquisition, or installation or a physical public improvement**

1. COSTS AT LEAST \$35,000 (AND UNDER \$1M)

o **Too Small**

Buying furniture for an existing community center
Planting a tree in a park

o **Too Big**

Building a new community center
Building a new park

o **Might work**

Renovating a section of a building for community center uses
Enhancing a part of a park with new play equipment

Bundling: Multiple small items that work together as a “system” that adds up to over \$35,000 can be eligible (e.g. a computer lab)

2. HAVE A “USEFUL LIFE” OF AT LEAST FIVE YEARS

- **Do Not Last Long Enough:**

Laptops (*Rolling “Laptop Carts” are eligible*)

Some municipal vehicles

3. A PHYSICAL PUBLIC IMPROVEMENT

- Work done in public space, buildings and land owned or controlled by the city.

Is it a “public purpose”? Ask: who owns the land?

- Directly owned by the city or another government agency
YES
- Owned by a non-profit with a relationship to the city
MAYBE -> “Non City Capital Project”
- Owned by a religious congregation, co-op, membership organization or a private individual
NO

Non-City Capital Projects

- In some cases, land or buildings owned by non-profits that work with the city can qualify.
- There are extra City requirements for these projects
- Host non-profits will need to be approved by the city through an **application process that runs January-March** (in addition to getting enough votes in PB to get funded)
- **Committees should discuss a non-city capital project's feasibility with the Council Member's staff by the end of December.**

CAPITALLY-ELIGIBLE ITEMS!

- **Street improvements**
- **Technology systems**
- **Repairs and renovations to a building**
- **Purchasing land/expanding a building**

NOT ELIGIBLE ITEMS

- **Expense budget items**
- **Repairing a privately-owned building (even if rented by a community group!)**
- **Repairing a religious institution's sanctuary (though spaces for public programs or the exterior of a landmark may qualify)**

NOT ELIGIBLE (TRICKY EXAMPLES)

Things that seem like they might be capital...

- Preventive maintenance programs
 - Painting, carpet cleaning, supply replacement
- Minor renovations of offices
 - Renovations that are limited to only painting, minor carpentry, etc. with no replacement of “building systems”
- Supplies & inventory
 - Printer cartridges, utensils, brochures
- Bulk purchases of low-cost equipment
 - Moveable trash cans, calculators, furniture

Let's Run Through a Few Examples...

- **“Community Center”**
- **“Trash Cans”**
- **“Safer Intersections”**

Potential Barriers

- An agency might not agree to begin a project until it is fully funded in the capital budget
- The agency has engineering or quality standards that the project might not meet or might significantly raise costs
- Getting an accurate cost estimate for a unique project
- Unforeseen conditions cause delay or increase the cost
- It might be unclear which agency should implement the project
- Might require expense funding for maintenance or maintenance agreement with a local organization
- May be too expensive to build in one year or may need additional funds from other sources

What should you do to make sure your projects will work?

Remain goal-oriented and be flexible

Consider a phased approach

Seek potential project partners

Look for precedents

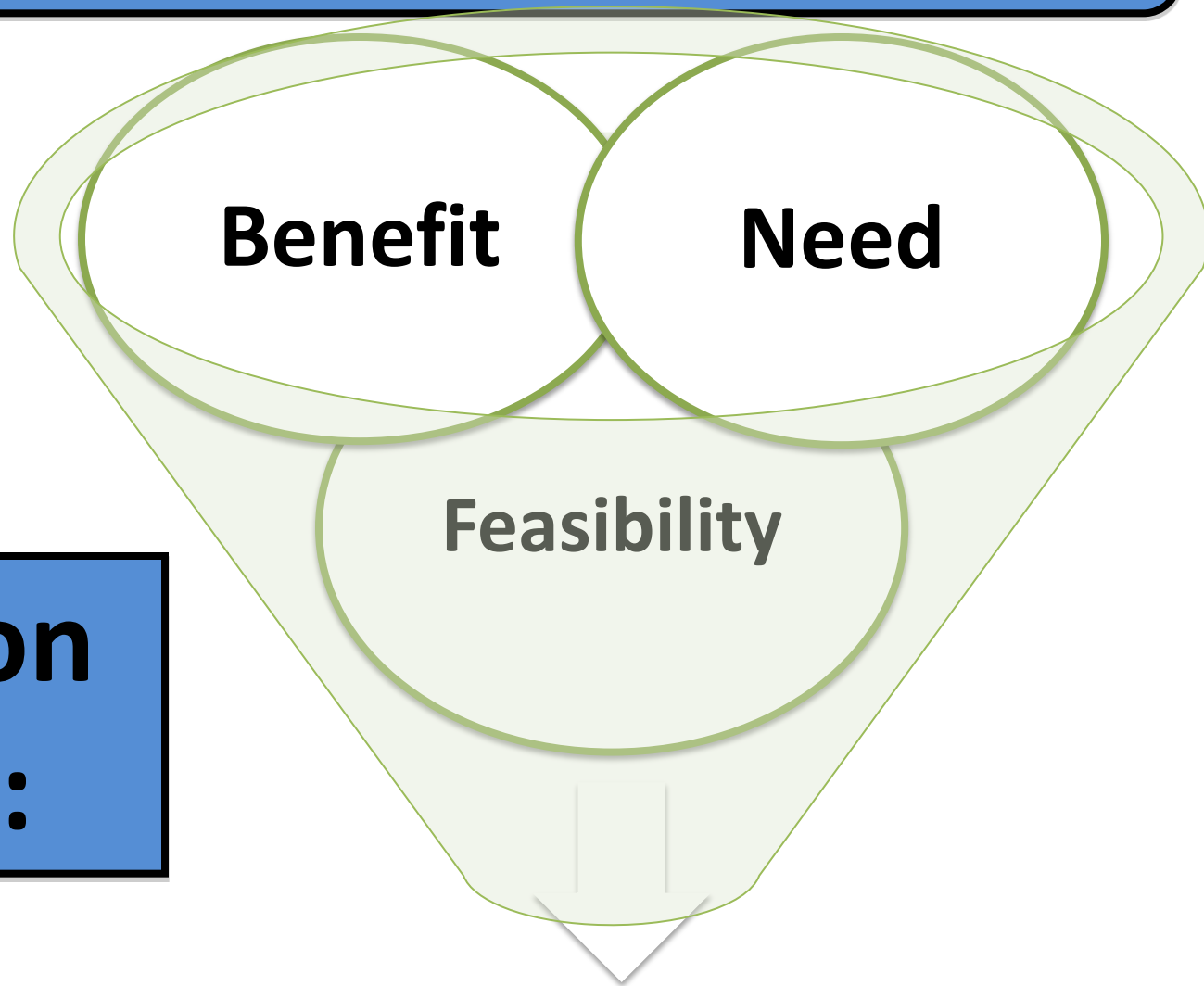
The End Goal: Project Proposals

Project Proposal Form

Project Name:
Location(s): (address, intersection, or landmark name)
Description: (1-2 sentences describing what the project involves)
Need: (Why is this project necessary? What local problems or needs does it address?)
Benefit: (Who will the project benefit? Which communities? How many people?)
Feasibility: (How have you verified that the project is eligible for funding and technically feasible?)
Potential Challenges? Other comments?
Estimated Cost:
Responsible City Agency or Organization:

The Council Member's office will distribute an online form to submit projects on using this template in the near future

How will you prioritize project ideas?



**Evaluation
Criteria:**

Reality Check!

PB in Chicago, Year 1:

177 Project Ideas

142 Eligible Projects

**36 Proposals on
Ballot**

**14 Received
Funding**

Committees and First Meetings

Committee	Initial Meetings and Locations
Streets & Sidewalks	Wednesday, November 16 th , 6:30-8:30 PM, PS 230
	Wednesday, December 7 th , 6:30-8:30 PM, PS 230
Transit	Wednesday, November 16 th , 6:30-8:30 PM, PS 230
	Wednesday, December 7 th , 6:30-8:30 PM, PS 230
Education	Wednesday, November 16 th , 6:30-8:30 PM, PS 230
	Wednesday, December 7 th , 6:30-8:30 PM, PS 230
Environment	Thursday, November 17 th , 6:30-8:30 PM, PS 58, 330 Smith St
	Thursday, December 8 th , 6:30-8:30 PM, PS 58, 330 Smith St
Public Safety, Public Health, and Sanitation	Thursday, November 17 th , 6:30-8:30 PM, PS 58, 330 Smith St
	Thursday, December 8 th , 6:30-8:30 PM, PS 58, 330 Smith St
Culture & Community Facilities	Monday, November 21 st , 6:30-8:30 PM, CM Lander Office, 456 Fifth Avenue, 3rd Fl
	Thursday, December 8 th , 6:30-8:30 PM, PS 58, 330 Smith St
Parks & Recreation	Sunday, November 20 th , 2-4 PM, CM Lander Office, 456 Fifth Avenue, 3rd Fl
	Sunday, December 11 th , 2-4 PM, CM Lander Office, 456 Fifth Avenue, 3rd Fl