PICK MY PROJECT

For public servants who are designing, procuring or managing a participatory budgeting community grants program

Pick My Project Playbook

VICTORIA
State Government

How to use this playbook...

Playbooks provide 'how to' advice. They include advice, strategies and insights for activities or processes.

This playbook looks at how to deliver a community grants program using a 'participatory budgeting' method.

The insights, process and recommendations in this playbook are based on the work of Pick My Project. You can start in any section, based on your needs and interests.

The first section provides an introduction to Pick My Project and participatory budgeting. The second section focuses on the stages used to design and deliver Pick My Project. The final section focuses on tasks and activities across seven streams of work. This is useful to practitioners who are seeking targeted advice within their field.

NOTE: The process and advice in this playbook are project specific. There are many other methods used in participatory budgets—a great place to look is www.participatorybudgeting.org.

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Introduction

What is 'participatory budgeting' and an overview of Pick My Project

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What is participatory budgeting?

While 'participatory budgeting' might be hard to pronounce, the concept is quite simple. It relates to a process where citizens participate in the decisions about how government money is allocated or spent.

This process is informed by the level of influence citizens have in decision-making, or the specific needs of a community.

Participatory budgeting processes have three important characteristics:

1. Accessible

The process enables a variety of citizens to be a part of the decision-making process. The approach used should focus on both equity and equality, actively addressing barriers to participation.

2. Democratic

The process must be open to participant feedback, and participation must have a direct impact on the outcome. Typically, decisions or priorities are reached through deliberation—leading to consensus and/or a vote.

3. Transparent

The process and its outcomes must be available for participants to see, understand and scrutinise. Participatory budgeting works best when the outcomes demonstrate positive change in the lives of participants and communities.

What is Pick My Project?

Pick My Project is Victoria's first state-wide participatory budgeting community grants initiative. It piloted a new way for community grants to be delivered in Victoria.

$30 million

The Victorian government allocated $30m to make local communities even better places to live.

2,300+

Eligible ideas submitted by Victorians aged 16+ across the state.

100,000

Nearly 100,000 Victorians voted for their favourite three projects in their local area.

237

237 projects across the state were picked! This included 120 projects in metropolitan and 117 projects in regional areas.

Pick My project is an online initiative delivered by the Victorian government.

In 2018, Victorians across the state, were asked to submit ideas for improving their local communities, and then to vote for their favourite three ideas.

All ideas and votes were received through a purpose-built website. The number of votes received decided which ideas were successful.

The $30 million fund was divided into 16 funding pools across the state.

These pools were based on pre-existing regions called 'partnership areas'. Each pool was allocated at least $1 million. Additional money was allocated based on the population of each region.

To ensure regional equity, funds were split 50/50 between Regional and Metropolitan Victoria.

In total 237 ideas were successful. The community response to Pick My Project exceeded all expectations. Delivering a state-wide community grants process grounded in engagement, community development and relationship building.

The stages of Pick My Project

Pick My Project pilot ran across ten stages with the following key objectives:

1. Planning
- Identify the strategic intent and sequence of steps within the process.
- Establish project governance, resourcing requirements and timing.

2. Awareness raising
- Test and adapt the concept, process and systems with key stakeholders and partners.
- Introduce the concept to the public prior to launch to generate awareness and anticipation.

3. Applications open
- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit ideas.

4. Assessment
- Ensure all ideas that progress to voting have met eligibility guidelines.
- Ensure all eligible ideas have support from partners and landholders.

5. Campaigning
- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

6. Voting
- Encourage Victorians to browse local project ideas in their community and vote.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

7. Announcing successful projects
- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

8. Funding agreements
- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

9. Grants delivery
- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

10. Evaluation
- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Pick My Project workstreams

Seven 'streams' of work were used to divide up Pick My Project tasks.

Based on the scope and scale of your process these streams could be separated or combined to suit your needs.

Project management

Delivery of the process including governance, probity, contracts and financial management, risk management, recruitment, monitoring and program evaluation.

Digital development

User research, development and testing of the website functionality and digital services.

Partnerships & Government relations

Coordinating relationships across state and local government entities and stakeholders. Supporting community partnerships, assessment, and grant delivery teams.

Communications & marketing

Delivery of the Pick My Project marketing including brand and asset development and advertising strategy.

Public engagement

Educating Victorian communities through the design and delivery of public events and webinars.

Establishing and managing support channels—phone, social media and email.

Assessment

Assessment of applications against program guidelines.

Coordinating with stakeholders to review and approve all assessed ideas.

Grants delivery

Funding of successful projects, including contract management, risk mitigation, communication and project support.

Stages

A description of the stages required for a 'participatory budgeting' community grants process

How to read the advice on stages

The following stages are based on the work undertaken for Pick My Project. It is just one way of delivering a participatory budgeting community grants process.

Pick My Project allowed for community participation in both generating ideas for how government money should be spent, and voting for the ideas which should be funded. Your process may involve more or less opportunities for participation based on context.

For example, a community infrastructure grants process may draw from a list of pre-existing 'ideas' based on approved plans and previous community engagement. In which case, a conversation about these ideas, and a voting component may suit your needs.

The stages are each described together with some of the critical outputs, and an indication of the effort across workstreams.

Stage 1. Planning

Objectives

- Identify the strategic intent, risks and sequence of steps within the process.

- Establish governance, project resourcing requirements and timing.

Description

The planning stage is critical to developing the shape of your participatory budgeting process, identifying how much influence communities will have in decision-making and how.

It is important to keep coming back to the three characteristics of participatory budgeting (accessible, democratic, transparent) in your strategy and planning documentation.

At the planning stage, you should be focused on building a strong team to support you in:

- developing relevant planning documentation

- identifying the relevant internal and external stakeholders and partners

- prototyping your processes (such as a website or other ideation/voting system).

Outputs

- Project planning documentation: strategy, budget, risk management, procurement, and recruitment.

- Prototypes of process elements (such as funding rules, grant guidelines, or website).

- Supporting documentation and plans (such as communications, digital inclusion or public engagement and stakeholder mapping, and the assessment process).

Effort by workstream

Project management

Digital development

Partnerships

Communications and marketing

Public engagement

Assessment

Grants delivery

NOTE: Using Human-Centred Design (HCD) when developing both the broad strategy and elements of the process (such as web development or public engagement), will support your success. DDI has developed an HCD playbook for the public service.

Stage 2. Awareness raising

Objectives

- Test and adapt the concept, process and systems with key stakeholders and partners.

- Introduce the concept to the public prior to launch to generate local deliberation.

Description

The 'awareness raising' stage comes in two parts:

First, test your process and its associated elements (such as guidelines, website, branding, or engagement plan) with key internal and external stakeholders and partners. For example, if your projects are likely to be delivered on local council lands, or local government is a potential auspice for funded ideas, ensure you have engaged local government CEOs. Discuss the process and incorporate your stakeholders' feedback to strengthen relationships. Strong relationships become invaluable for the more resource-intensive stages of your process.

Second, start to promote your process and timelines to the broader community, to increase awareness and provide local communities with time to prepare for the application process. Listen to feedback on the process and adapt your process or messaging to address issues and concerns.

Outputs

- Key stakeholder engagement.

- Refined process elements (such as grant funding guidelines, website or application form).

- Awareness communications plan (including social media, media release).

- Establish communications protocols and business systems to manage public enquiries.

Effort by workstream

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Stage 3. Applications open

Objectives

- Launch a digital platform to receive applications.

- Encourage and enable all eligible Victorians to submit appropriate ideas.

Description

This is a critical stage for a participatory budgeting grants process. The community must feel excited and able to share their ideas on how government funds should be spent. Without enough ideas at this stage, you may not be able to conduct the voting stage.

To support participation, the application process must be accompanied by strong communications and engagement approaches that clearly explain the steps required to submit, to work with communities to ensure ideas align with the guidelines, and ensure that disadvantaged parts of the community have access to the grant information and support.

Outputs

- Launch process to receive application (such as purpose-built website).

- 'Applications are open' communications campaign and 'How to submit your idea' materials.

- Public engagement activities to support the community both online and offline.

Effort by workstream

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NOTE: To support accessibility, your application form should be as simple as possible while meeting the needs of your assessment process.

This is different to many grants processes where a lot of detail and effort is required to apply. Be aware that making the application process easy and accessible does mean that your assessment and funding agreement stages may be more resource intensive—as you further explore the risk profile and detail of each project at these later stages.

Stage 4. Assessment

Objectives

- Ensure all ideas that progress to voting have met the eligibility guidelines.

- Ensure all eligible ideas have appropriate support from partners and landholders.

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Description

Depending on the volume of ideas you have received and your staffing, this can be a very resource-intensive period. Assessment of every idea against the grant guidelines is critical to ensure that the ideas that proceed to the voting stage are eligible and have a satisfactory risk profile.

Risk assessments should be reviewing ideas against relevant policy and 'leading practice'—particularly projects that are focused on health, wellbeing, safety, or projects that could in some way lead to community division or discrimination.

Eligible ideas should also be reviewed by the relevant partner and/or landholder for their support. This an opportune time to liaise with applicants to adjust ideas or ask for further information.

It is essential to provide feedback on the assessment outcomes to all projects. It will be important to consider the most appropriate communications approach and to develop clear reasoning in your communications for why projects may be ineligible to proceed.

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Outputs

- Assessment results for all project ideas (eligibility, risk profile and stakeholder endorsement).

Effort by workstream

Project management

Digital development

Partnerships

Communications and marketing

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Stage 5. Campaigning

Objectives

- Enable participants to promote their project ideas within their local communities.

- Encourage participants to consider the needs of hard to reach community members.

Description

Ideas need community votes to be successful. In order to gain votes projects must engage their communities.

It is important to help create an even playing field by providing applicants with a solid foundation in terms of communication skills and techniques. You can do this through a range of communication materials, and public engagement.

Ideally this stage occurs prior to the voting stage, but it could overlap with the voting stage.

Outputs

- 'How to promote your project' communications materials and support.

- Public engagement and support both online and in person.

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Case study: The women's spirit project

Region: Southern Metro
Budget: $50,600
Votes: 240

Transforming women's lives in Frankston

The Women's Spirit Project (WSP) was established in 2018 to address a 'gap' for women experiencing disadvantage in the greater Frankston area.

"There's a community of women who are really struggling, and this community of women need support outside of case management and counselling," explains WSP Founder Jodie Belyea.

The grassroots, volunteer-led pilot aimed to fill this gap by providing vulnerable women with the opportunity to build their confidence, courage and resilience through a 20-week fitness, health and wellbeing program.

Offering this program at no cost to participants was critical, so for Jodie, "the [Pick My Project] timing was impeccable. The universe was shining on us!

"I was elated, thrilled, jumping out of my skin when I found out we'd been successful."

With enough funding under their belt, the pilot could finally come to life.

Seventeen women were mentored weekly by volunteers to develop their physical fitness, practice mindfulness, learn about nutrition, and develop their goal-setting, communication and team working skills.

All this culminated in a 67km trek across three nights and four days, from Frankston to Cape Schanck on the Mornington Peninsula.

"[The trek] was designed to test the women, to be out in the elements, to work as a team," says Jodie.

She believes such an achievement resets their perception of self and gives them a foundation to build upon for them and their children.

This empowerment was evident in the women. "Being on this track now, there's no height I cannot climb," remarked one participant.

Many of the women said the program was life-changing. An evaluation survey conducted by Monash University agreed. The findings of the participant survey saw enhanced feelings of personal wellbeing, connectedness, self-esteem, physical self-perception and resilience.

The design of the pilot has served as an outstanding example of collective impact, of groups from different sectors coming together to solve a specific social problem.

"What I have seen from the get-go is a project that has mobilised volunteers in the community, women from all walks of life with lots of different skills, and lots of different organisations. All getting involved to support other women and their families," says Jodie.

"For me, it's an example of driving social change from the grassroots up, not always the top down."

Now, Jodie and the WSP team are looking to the future. They're working to develop a sustainable non-profit business model to continue to help inspire, empower and transform women's lives.

Find out more: womensspiritproject.org

Stage 6. Voting

Objectives

- Encourage Victorians to browse project ideas and vote for their favourites.

- Enable all eligible Victorians to vote, supporting more vulnerable communities.

- Ensuring all Victorians have an equally weighted vote.

Description

Voting is critical to the participatory budgeting process. Without adequate participation, the process will lack community support and legitimacy.

The voting process (and possible requirement for proof of identity) must be balanced against security. The integrity of the voting process will be critically important to the process success and perceptions of participants and community more broadly.

In the spirit of accessibility and democracy, it is vital in this stage to communicate broadly, and support a variety of community members to vote. This will mean providing a range of public engagement approaches and equipping your applicants with information and advice to support their local communities through the voting process.

Outputs

- Launch voting process.

- Communications campaign and materials.

- Public engagement to support voting.

- Support channels including phone and email.

Effort by workstream

Project management

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Stage 7. Announcing successful projects

Objectives

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Description

At end of your voting stage, it will be important to assess the votes. Looking for any unusual patterns of voting behaviour will help you understand if anyone has 'gamed' the system.

Things to look for include unusually high numbers of votes across the voting stage or at unexpected times and days, or IP addresses (if the process is an online vote) which repeat or are located outside of your process boundaries (such as international locations). You can also work with the electoral commission or other databases to check samples of your voter data, particularly for any unusual voting outcomes.

Once you are satisfied with the validity of the outcomes, apply any other funding rules or stipulations you have established in your funding guidelines. With the final outcomes prepared, ensure your governance structure has again reviewed the successful ideas with their associated risk profiles (as some of these may have changes since the assessment process).

Once the results are confirmed, it is time to communicate to participants about the voting outcomes. Ensure that successful and unsuccessful applicants learn the outcomes at the same time. Be sure to highlight next steps for successful ideas, and any relevant opportunities or avenues for funding which might be available to unsuccessful ideas.

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Outputs

- Voting check outcomes.
- Successful ideas approved.
- Media releases and communications materials about voting outcomes.
- Transparent and accurate vote tallies.

Stage 8. Funding agreements

Objectives

- Enable participants to develop detailed project plans.

- Assist grants administrators to support and performance manage project owners.

- Finalise funding agreements for all successful project ideas.

Description

Successful ideas now need to become fully fledged projects with planning documentation to support their funding contracts. This may be a resource-intensive period if you have many time-sensitive projects, or a large variety of project types.

To help speed up the process and ensure the documentation is both consistent and appropriate, provide guidance to applicants through engagement and/or document templates. Ensure your documentation highlights any opportunities to celebrate project milestones through events or media.

Depending on the types of projects, you may wish to invite subject matter experts (for example council planning officers, or previous grant recipients) to provide advice to applicants. Applicants will also benefit from being able to connect with similar projects in their area or category to compare strategies and advice.

Outputs

- Supporting communication materials and engagement with project teams.

- Funding agreement and supporting documentation templates.

- Executed funding agreements.

- Reports to governing body.

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NOTE: Funding agreements for community grants in government generally use pre-existing templates.

For state government these are called 'Victorian Common Funding Agreements' which include a set of non-negotiable terms and conditions.

Stage 9. Grants delivery

Objectives

- Commence funding and grants management.

- Support and build capability of community organisations to deliver their project idea.

- Celebrate the successes of projects through events and media opportunities.

Description

The grants delivery stage is where the rubber hits the road. The ideas become project plans, and funding agreements commit these plans to timelines, milestones and reporting requirements.

Your successful grant recipients may be new to the world of community grants, so be patient and supportive. Risks to project delivery will emerge, and often the longer the delivery timeline, the more chance that risks will emerge along the way. From relationship breakdowns in project teams to natural disasters and everything in between, be prepared and have processes in place to manage these as they arise.

Outputs

- Delivered projects.

- Risk management and progress reporting.

- Supporting communications material (such as fact sheets, FAQs, and regular emails).

- Community events and media opportunities (such as project launch or milestone).

- Acquittal management and data collection for evaluation.

- Reports to governing body.

Effort by workstream

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NOTE: Managing project risks will be a critical part of this stage. Tools to manage risk during this stage include strong relationships with the project delivery teams, regular site visits, risk reporting (such as a risk register), and utilising your governance structure (such as a project control board) to support your team with risk.

Stage 10. Evaluation

Objectives

- Assess the impacts of the program.

- Identify strengths and weaknesses of the process to improve future iterations.

Description

Evaluating the impacts of the process and the successful grants is not only great communication material. It is also an opportunity to gain valuable knowledge about how to deliver positive impacts to local communities. Evaluating the process will lead to process improvements—supporting more efficient and effective grants process in the future.

Outputs

- Evaluation summary report.

- Case studies and communications materials on impacts and outcomes of grants.

- Regular project updates through existing communications channels.

Effort by workstream

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How to read the advice on workstreams

This section digs a little deeper into the activities required per stage, dividing these activities by workstreams. The workstreams are based on the work undertaken for Pick My Project. It is just one way of organising your team to deliver your process.

Each workstream describes its responsibilities in the participatory budgeting community grants process. The workstreams then outline the main activities required at each stage, including elements to include and other advice.

Work streams

A description of key tasks across the process, grouped by streams of work

Project management

Responsible for ensuring the smooth delivery of your process, including governance, probity, contracts and financial management, risk management, recruitment, product delivery, grants administration and program evaluation. Your project management team may consist of several members managing office duties, procurement and project management tasks.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop project planning and initiation documentation	This is a suite of documents to support the establishment of your project. It includes critical project management documents such as: • project plan (including key activities, skills needed and timelines) • budget and procurement plan • recruitment plan (critical if your project has resource peaks and troughs) • risk and issues framework and register • monitoring and evaluation framework.
Establish governance processes	A Project Control Board (PCB) is ultimately accountable for the success of a project. The board's role is to make effective decisions and provide clear leadership and direction throughout the lifecycle of the project. The PCB will require regular reporting in order to make informed decisions, and additional assurances may be required throughout the project in areas such as probity or legal counsel. Establish your PCB, regular reporting frameworks, and create links to additional expert support.
Build your team	Based on your project planning and initiative documentation, begin the recruitment process and build out the necessary parts of your team to support in prototyping your approach, procurement and planning.

Confirm key project characteristics

The success of your participatory budgeting process will rely on an understanding of:

- The funding spread and rules—how your grants fund will be divided (this could be a categorical, demographic, or spatial or a combination of these or other factors). Access and equity should be a major focus in deciding this.

- Grant guidelines—your eligibility criteria for submitted ideas, definitions of who can submit an idea (it could be local individuals, registered not-for-profits, business). Do applicants need to find an auspice partner to manage receipt of funds, or will your team run this process?

- Critical products—What technical products do you need to support your process? Will you buy, borrow, build or create a hybrid? What other products are required and how will you be ensuring that completed products meet quality criteria?

NOTE: You may need to develop funding rules or strategies that protect small groups from larger groups as best you can. For example, large cities or groups with active memberships (such as sporting clubs or schools) may be able to mobilise their community to vote in higher numbers. At this stage, probity advice on funding rules will also be valuable.

Stage 2. Awareness raising

- **Test and adapt the concept, process and systems with key stakeholders and partners.**
- **Introduce the concept to the public prior to launch to generate local deliberation.**

Stakeholder management

As the team works through testing the concepts, process and systems with key stakeholders, there will be a lot to keep the PCB and/or other project sponsors informed about. The feedback received from stakeholders will need to be considered and incorporated where possible into the designs and plans for other streams of work. Major changes will need to be endorsed through PCB.

Core project management tasks

As the team grows and evolves, core project management tasks will be critical— Managing product and program delivery requires careful coordination and regular check ins with streams leaders on activities, quality of what is produced, timelines and budget. These tasks will progress throughout the remaining phases as you deliver on the project plan.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Core project management tasks	As the team grows and evolves, core project management tasks will be critical— Managing product and program delivery requires careful coordination and regular check ins with streams leaders on activities, quality of what is produced, timelines and budget. These tasks will progress throughout the remaining phases as you deliver on the project plan.
Preparation for Assessment phase	Ensuring that the team is well prepared and supported as the process gears up to peak resourcing and effort over the coming phases.

NOTE: This will be a peak time for the contact centre staff as they explain how the funding rules and grant guidelines apply to participants. There is an opportunity to increase resourcing to the contact centre in this peak period by employing assessment team members early. This will familiarise staff with the guidelines prior to assessment stage.

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Core project management tasks	Assessment stage is one of the most challenging stages of the process, your team will need to be adequately resourced to support the assessment of all submitted ideas. Governance body also needs to be available to review any ideas failing the assessment stage. The focus will be on the review, but it is critical you ensure that planning and delivery in other streams is also resourced adequately.
Hold point: Approvals (!!)	Prior to announcing eligible project ideas, information about the ideas (such as location, project owner, total value and project category) should be put to the PCB and/ or relevant parts of your authorising environment. Critically important is the review and approval of risks associated with project ideas or the process more broadly. The overall metrics should also be compared to your project targets to understand how the process is tracking.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Core project management tasks

In addition to the core project management tasks, it may be necessary at this stage to ensure the team is ready to support the public with voting. The voting stage will be a peak work period, based on your process, how many people have submitted eligible ideas, and the extent to which you will be supporting your communities through the voting process.

Stage 6. Voting

- Encourage Victorians to browse project ideas and vote to their favourites.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

Core project management tasks

During the voting stage, your team will need to be agile to meet the needs of the community. Voting is critical to the legitimacy of your process and making this as equitable and accessible as possible will be important should you have to defend your process.

Remain responsive to the needs of community and their feedback and be prepared to adjust your support in terms of staff resourcing (reassignment, working days or hours), approaches (additional local support for vulnerable communities) and communications materials (instruction printouts, additional translated materials, and informational videos).

Consider the impacts of accumulated fatigue on the team.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Core project management tasks

During this short stage the focus for project management is to ensure that:

a.   the accuracy of the voting is verified

b.   all funding rules have been applied appropriately

c.   risk profiles and eligibility of the successful projects are up to date, and endorsement secured with the relevant landholders and partners prior to briefing and/or announcing the outcomes.

Hold point: Approvals (!!)

Prior to announcing the successful project ideas, information about the eligible ideas (such as where they are, who has put them forward, total value and project category) should be put forward to the PCB and/or other relevant parts of your authorising environment. Critically important is the review and approval of risks associated with project ideas or the process more broadly. The overall metrics should also be compared to your project targets to understand how the process is tracking. With the approvals in place, ensure all partner approvals are in place. Now your team can relay the outcomes to participants through the appropriate channels.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Core project management tasks

At this stage the grants delivery team will be required to grow to support both the development of funding agreements for the successful project ideas, and to ultimately support their delivery.

Use the time while the team is forming to educate successful participants on the requirements of funding agreements and provide them with materials to support developing their projects ideas into more details project plans. Utilise your public engagement and communications teams to support this work.

NOTE: Depending on your organisation, you may be passing the grants delivery component to a different team within the organisation who specialise in grants delivery across a range of grants. Identify whether this is the case early in your planning so that any pre-existing processes, systems or preferences are taken into consideration.

Additionally, if you are handing this to another team, ensure you have adequate time to plan a handover of data and processes to make the experience seamless for participants. A Memorandum of Understanding (MOU) is a useful instrument for the two teams to manage ongoing roles, responsibility, obligations or risk and issues management.

Exit interviews and team closure

As your process shifts focus from participatory budgeting to grants delivery, parts of your team will begin transitioning to other streams or finish their work with you all together. Exit interviews can provide a wealth of information and are an important process for exiting staff to go through. Ensure you work closely with team managers and your HR support to ensure this happens smoothly.

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

Core project management tasks

Tasks include risk management and reporting to the PCB and other key stakeholders. As the projects come to life a variety of risks will need to be managed. The outcomes of projects will need to be communicated both to key stakeholders, but the wider voting public through communications, event and media opportunities. This work will require resourcing.

As the participatory budgeting process has been completed, it is also a good stage in which to focus on gathering lessons learned from the staff. This will help inform any planning you are required to undertake future rounds of your process.

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

The evaluation report responds to questions of cause and effect. It assesses or estimates the value, worth or impact of your process, based on the Monitoring and Evaluation Framework developed at project inception. The report is required to describe the collection and analysis of data used to track the progress of program/project implementation against targets and outcomes—as a commentary for the PCB and managers on the outcomes, and to advise on opportunities to improve any future rounds.

Project closure

Project closure consists of processes that a performed to officially finish and close the project such as paying all outstanding invoices, record overall performance and archive all important documentation. It is an important step to ensure project scope and key tasks have been delivered and to verify that the project has met the outcomes for which it was created. You will also need to confirm that maintenance and operation arrangements are in place (for technology) or that appropriate archiving and decommissioning processes have been followed.

A Project Closure report is generally prepared and is a companion document to the final evaluation report.

Digital development

The digital team is focused on the user experience, website development, databases, systems, and how these things work together. Your digital team may consist of two to three people.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop stream planning documentation	This is a suite of documents to support the outline the development required of your project. It includes critical documents such as: • digital development plan (including key products, testing, privacy impacts and development timelines) • digital development budget and procurement.
Build your team	Based on your project planning and initiative documentation, begin the recruitment process and build out the necessary parts of your team to support prototyping, procurement and product planning.
Develop prototype	The digital team will be responsible for procuring a specialist platform or developing a purpose-built digital platform for the project. This includes: • developing the functional specifications of the website and creating a user journey map • creating the cloud architecture and data management plan to understand how data will flow between new and/or existing systems (such as databases, marketing platforms or reporting tools) • procuring website hosting • working closely with the communication and marketing team to secure the appropriate digital branding assets.

Confirm process parameters

In order to build your digital processes efficiently, it is critical that the development team work collaboratively with the broader team to ensure the process parameters are agreed. This involves confirming how the funding rules and grant guidelines inform the digital prototypes.

Stage 2. Awareness raising

- Test and adapt the concept, process and systems with key stakeholders and partners.
- Introduce the concept to the public prior to launch to generate local deliberation.

Test and develop the grant application form

Effective application forms require user research and testing. It is important that all key data fields and labels are identified and then tested with members of the public. This will help clarify any confusion with instructions and limit jargon. It is also important to test that any interactive elements, including maps, drop-downs and save functions are easy to use.

Launch website

To support public awareness of the process you will need to launch a simple web page that includes an overview of the application process and an opportunity to register to receive notifications for project launch.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Launch grant application form

Publish the application form for the website, together with any supporting communications material such as guidelines, 'how to' materials, and contact information including public engagement opportunities.

Provide regular data updates

As the applications stage progresses the communications and engagement approaches can be tailored or adapted based on real-time data from the website. This is only possible with regular data reporting from the development team to the work streams.

Provide technical support

As community members begin to use the website, technical support will be required. Ensure you have allocated resource to support participants and that the contact centre has an established process for connecting participants to technical support.

Finalise assessment process

An easy-to-use assessment process will be critical to managing the resource-intensive assessment period. Ideally, the submitted ideas can be assessed without the need to be copied into a new database or system. The assessment process must align with the grant guidelines and assessment requirements (such as eligibility, land and partner permissions and risk profile).

During the applications stage you should finalise the specifications and build of the assessment process. This should include user testing from all your user groups, which may be both internal (assessment team members) external user groups (such as local council officers, or other government entities).

NOTE: Please ensure that you have fully considered the privacy implications of your process, particularly if you will be sharing access with external parties. Protection of personal data is critical to the integrity of your process and strengthening your relationship with communities. For further details on Victoria's Information Privacy Principles go to:

www.ovic.vic.gov.au/privacy/for-agencies/information-privacy-principles

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Launch assessment process

The assessment process will provide a clear framework for the assessment team to review submitted ideas. The process should allow the team to run through the eligibility criteria and flag risks with other team members, external stakeholders or with the applicant themselves. This will also support reporting to governing body.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Make campaign assets available

Update the website to ensure that participants can access all relevant information to support their local campaigning and list where and when public engagement will be happening to support them.

Finalise voting process

The user experience at voting stage will shape your voting outcomes. Ensure that ample user testing from diverse participants informs your design. Ease-of-use must be carefully balanced with security requirements and protections to ensure the integrity of the voting outcomes. This is an excellent point in the process to involve independent probity advice.

Stage 6. Voting

- Encourage Victorians to browse project ideas and vote to their favourites.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

Launch voting process

Activate your voting process, together with any supporting communications material such as guidelines, 'how to' materials, and contact information including public engagement opportunities.

Provide regular data updates

As voting progresses the communications and engagement approaches can be tailored or adapted based on real-time data from the website. Regular data updates presented to the team that shows current performance compared to agreed targets will help shape both strategic direction and practical efforts.

Provide technical support

As more participants begin to use the voting process, technical support will be required. Ensure you have allocated resource to support participants and that the contact centre has an established process for connecting participants to support for technical questions.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Apply funding rules

You may have funding rules that will limit or impact the voting outcomes (such as geographic or categorical limits). Apply these rules now in order to provide a preliminary list of successful projects for further verification.

Manage voting verification process

Interrogate the voting data behind your preliminary list of successful projects, you may look at unusual trends in voting behaviour for certain projects (considering things like time and date, user IDs, or IP addresses).

Release project outcomes

The status of each project (successful or unsuccessful), as well as the number of votes received and any decisions that affected the voting outcome should be available to the public. This transparency is important for community trust.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Data migration to grants system
Depending on the grants administration system used, this step may require project data migration.

Team closure
With development complete, ensure you are capturing lessons learned from your team as they depart and celebrating all your hard work!

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

General digital support
Support may include minor updates to the website and any technical support with data management.

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Archival and close of digital systems
Close out the public-facing website for your initiative, and ensure you have archived all documentation relating decisions made on grant outcomes.

Evaluation services
Contribute to the evaluation process with data and process insights from the team.

Partnerships & Government relations

This team is responsible for building or strengthening relationships across key stakeholders and partners such as local government or state departments.

The team is critical for the implementation of a robust process that includes key stakeholders during all stages. Your partnerships team may have one or two people to support delivery at peak times.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop stream planning documentation

This is a suite of documents to outline stakeholder requirement including:

- stakeholder engagement plan (including stakeholder matrix, approach, communications and timelines)

- stream budget and procurement.

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Build your team

Based on your project planning, start the recruitment process and build out the team to support your stakeholder objectives.

Stage 2. Awareness raising

- Test and adapt the concept, process and systems with key stakeholders and partners.
- Introduce the concept to the public prior to launch to generate local deliberation.

Deliver applications communications materials

Distribute application support materials to key stakeholders. This could include posters or leaflets placed in public locations such as local government offices, departmental or agency offices, schools and libraries.

Engage key stakeholders

The success of project delivery will rely on early and effective engagement with key stakeholders. Particularly those who will play important roles as landholders and project partners.

This will need to include a mix of engagement and communications approaches based on your stakeholder groups and needs.

Brief your stakeholders early on to give them enough time to feed into, improve and promote the process. Depending on the scope of your process, this will be a resource intensive period for the Partnerships and Government Relations team.

NOTE: The DPC Human-Centred Design Playbook includes a number of methods to engage key stakeholders. This includes templates for agendas and processes for structured meetings.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Provide support to stakeholders

As community participants start submitting applications, they will also begin to look for advice from partners about land use, policy or planning and auspice opportunities.

Your team will be required to support stakeholders in this process. Ensure you have allocated resources to support stakeholders during this time, and that the contact centre has an established process for sending stakeholder questions to you.

Prepare for assessment stage

This is the time to educate your landholders and partners on the assessment workflow. Identify key contacts within each organisation (e.g. dedicated local government officers) for follow-up on project ideas going through assessment.

We recommend you demonstrate the assessment workflow, so stakeholders are comfortable accessing the system and approving applications.

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Support stakeholders during assessments

Many key stakeholders will need to provide feedback on submitted ideas. Supporting stakeholders with this process will help ensure a quick and effective turnaround of assessments. This may include explaining the assessment process, as well as responding to stakeholder issues or queries as they arise.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Notify stakeholders of eligible projects	Notify project partners and landholders of the projects that are eligible for voting. Eligibility will have been in part based on their feedback during the assessment.
Deliver voting communications materials	Distribute participant voting support materials to key stakeholders. This could include posters and leaflets to be placed in public locations such as local government offices, departmental or agency offices, schools and libraries.
Provide support to stakeholders	As community participants prepare for voting, they will seek advice from partners about promoting their idea. Your team will need to support stakeholder questions in a timely manner.

Stage 6. Voting

- Encourage Victorians to browse project ideas and vote to their favourites.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

Provide support to stakeholders	Your team will be required to support stakeholders through the voting period. Stakeholders could be looking to run activities such as voting spaces to support participants, or simply to engage their communities more broadly to increase awareness of your process. Ensure you have allocated resources to support stakeholders during this time, and that the contact centre has an established process for sending stakeholder questions to you.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Notify stakeholders of voting outcomes

Stakeholders will be interested in which projects have received enough votes to progress to funding—particularly if they are a landholder or project partner. Provide your key stakeholders with lists relevant to their interests.

NOTE: Be sure to protect any participant personal information when sharing data with external parties.

Prepare your subject matter experts (SMEs)

For some stakeholders with subject matter expertise (such as school-based projects, building or planning knowledge of local government, or public open space) there may be an ongoing role in the next stage with providing advice to relevant project as they build out their project plans. Compile a list of willing stakeholders and their areas of expertise as an important resource for participants.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Share knowledge between participants and SMEs

Successful project ideas now need detailed planning for their funding agreements. Work with the communications and engagement streams to support successful project teams. Practical knowledge, realistic project timings, likely risks and opportunities, relevant laws, guidelines and processes will all be vital to participants who are building out their initial applications into complete project plans.

NOTE: This process works well through a combination of downloadable planning templates and online information (such as examples of funding agreements), live conversations as part of a roadshow, or online through webinars. Participants particularly benefit from the opportunity to hear from SMEs and discuss with other similar project teams.

Provide support to stakeholders and grants delivery team

As the funding agreements are developed and executed, issues may need to be managed between your grants team and project partners and/or landholders. Leverage the relationships you have developed through the process to date to support the grants delivery team and key stakeholders as required.

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

Provide support to stakeholders and grants delivery team

Over the course of the funding period it is likely that risks and issues will arise among your successful projects. Supporting both stakeholders and the grants delivery team will be important to ensuring the smooth and successful completion of projects. Ensure you have allocated resource to support stakeholders during this time, and that the contact centre has an established process for connecting stakeholder questions to you.

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

Contribute to the evaluation process with data and process insights from the team.

Team closure

With the process now complete your team will wind down. Ensure you are capturing lessons learned from your team as they depart and celebrating all your hard work!

Communication & Marketing

Tasked with delivering campaign communications, brand and marketing materials. The communications and marketing team may need two or three people at peak times, depending on the scale/scope of your process.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop integrated marketing communications campaign strategy	The campaign strategy sets the direction for delivering the communications and media stream of work. The strategy should be developed in consideration of the broader project planning documentation and should include: • brand and brand positioning • communications goals and objectives • target audiences and channels (including audience matrix and segmentation).
Plan for translation of communications materials	Throughout the process you will need to have factored in time and consideration for any translated materials. The languages you require will vary depending on the nature and scope of your process. Work with demographic data to understand who your target groups should be. Consider both the largest language groups and smaller or more vulnerable groups with less access to English. Once identified, work with an accredited translation service to ensure you understand the turnaround times on communications for each language you require as these may vary.
Plan advertising campaign	An advertising campaign helps to inform and motivate community to participate. Developing a brief for a media buying agency should be made in consideration of the campaign goals and objectives. The following channels may be useful: • print (metro, regional, community, CALD) • radio (metro, regional commercial, community and multicultural) • digital (display banners and social media)

Procure creative services agency

Campaign deliverables will need to be prepared during this stage. This can include:

- brand assets
- website designs
- videos
- social media posts and templates
- radio ads
- print collateral.

Work closely with the Project Manager to ensure all the necessary procurement steps have been taken and requirements met.

Build your team

The team will need to be recruited at the beginning of the project in order to contribute to strategic and operational planning. Begin the recruitment process and build out the necessary parts of your team to support communications and marketing.

Stage 2. Awareness raising

- **Test and adapt the concept, process and systems with key stakeholders and partners.**
- **Introduce the concept to the public prior to launch to generate local deliberation.**

Implement awareness stage campaign

When the process is ready to go public, implement the tactical requirements for the awareness and applications stages as outlined in your strategy. Channels will likely include:

- website updates
- eDMs
- digital and print collateral (such as posters and flyers)
- social media (such as Facebook, Twitter, LinkedIn)
- advertising (including digital, radio and social media)
- media releases (including any specific or targeted releases).

NOTE: Ensure you have considered the resourcing required for social media channels and moderation. This role may sit well with the contact centre staff to ensure that process advice remains consistent across all modes of communication (such as email, phone or Facebook).

Review strategy and prepare for applications stage

Based on the initial response, feedback and any amendments to process, review the strategy to ensure your plan remains appropriate to the needs of the process, communities and stakeholders.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Implement applications stage campaign

Implement any additional steps for the applications stages as outlined in your strategy. This might include additional information on the voting process, such as 'how to' videos or guides, and updates to information such as funding rules, equity in the process, grant guidelines and eligibility.

NOTE: Any new collateral at this stage will be based on the dynamic needs of communities and stakeholders. Be prepared to resource additional support for the public engagement, digital development, and partnerships streams based on their operational needs.

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Review strategy and prepare for campaign and voting stages

Based on the outcomes of applications stage, review your strategy to ensure it remains appropriate to the needs of the process, communities and stakeholders. The campaign and voting stages both require strong supporting and campaign communications materials, so use this time to map out these requirements.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Release capability-building communications

A number of support resources need to be developed to support eligible project owners' campaign for votes, including:

- 'How to promote' tip sheet to help participants think about the communications needs of their communities (including multicultural, older people and young people)

- customisable promotional materials (such as a flyer or social media 'frame').

Finalise voting stage campaign materials

The voting stage will probably be your largest campaign throughout the process. Prepare for this appropriately and take the opportunity to adjust your approach based on any feedback received during the campaigning stage.

Stage 6. Voting

- Encourage Victorians to browse project ideas and vote to their favourites.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

Implement voting stage campaign

Implement the tactical requirements for the voting stage as outlined in your campaign strategy. Channels will likely include:

- website updates

- eDMs

- digital and print collateral (such as posters and 'how to vote' flyers)

- social media (such as Facebook, Twitter, LinkedIn)

- advertising (including digital, radio and social media)

- media releases (including any specific or targeted releases).

NOTE: Be careful at this stage to provide promotion that is fair to all your eligible projects. Any perceived bias at this stage will endanger the legitimacy of your process.

Prepare for announcements stage communications

Review your strategy to ensure your plan remains appropriate to the needs of the process, communities and stakeholders. The announcements stage is vital to celebrating the success of the project ideas, as well as the process itself. Ensure you are prepared and resourced to issue a range of communications in the coming stage.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Implement announcements stage campaign

Implement tactics to support the successful projects announcement. Channels will likely include:

- website updates

- eDMs (to successful project ideas, unsuccessful project ideas, voters and registered website users)

- media releases (including any specific or targeted releases)

- social media.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Develop events / media process

Develop a process to identify and facilitate media and event opportunities. Senior members of your organisation may wish to attend these events or provide comment to media about the projects. Key steps in developing this events and media process may include:

- Agree how project teams can self-identify event and media opportunities.

- Agree process for gathering this information and providing to relevant parts of your organisation in a timely manner and helpful format.

- Agree next steps to finalise event or media arrangements, including roles and responsibilities within your organisation and with the project team.

- This process supports successful projects to celebrate your success and maintains a relationship with participants.

Develop branding guidelines

To help protect the brand of both your organisation and the process you have run, ensure that project teams have clear guidelines on how to apply your branding to their project collateral. Guidelines should include advice on:

- appropriate branding of assets (which assets should and should not be branded)

- application of logo and branding (including access to the logo and any relevant brand assets)

- written acknowledgement of the funding

- requirements and steps for approval of either logos or writer acknowledgements.

NOTE: Some project ideas make carry higher risk profiles than others. Work with the assessment / grants delivery team to understand if there are any specific projects which present risks or opportunities that may require specific events, media opportunities or branding terms or conditions added to their funding agreements.

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

Provide support to project teams and grants delivery team

As project ideas come to life, the role of communications and marketing will be primarily to:

- Support project teams with approvals and advice regarding branding.

- Support the events and media opportunities process.

- Collect and curate project idea updates to share on social media.

- Develop and release eDMs to support the operational requirement of your process and grants delivery (such as reminders of events and media opportunities, updates on new advice or processes developed to support grants delivery, or tip sheets on reporting and acquittal processes).

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

Contribute to the evaluation process with data and process insights from the team.

Team closure

With the process now complete your team will wind down. Ensure you are capturing lessons learned from your team as they depart and celebrating all your hard work!

Case study: Ballarat-Sebastopol BMX Track Surfacing Upgrade

Region: Central Highlands
Budget: $200,000
Votes: 179

A BMX track for all seasons in Ballarat-Sebastopol

The Ballarat-Sebastopol BMX Club has been a cherished part of the Central Highlands community since 1974.

Riders flock to the track, but during the heavy rainfall months, they were often sent turning on their wheels.

"Living in Ballarat, we only had a small window of time that we could ride without worrying about mud," explains Rob Pompe, Ballarat Sebastopol BMX Club President.

"We wanted an upgrade on the track. We wanted a surface that was usable year-round, hard wearing, safe to ride on and state-of-the-art...the amount that we could possibly get from Pick My Project fitted into what we wanted."

The club knew the community would support this project. Not only would it enable year-round racing events, but safer riding conditions for the many kids who use the track too.

"We were over the moon when we found out we were successful. We couldn't believe it!" Rob says. "All the work we put into it, all the people who backed us on it, to be able to go back to them and say we were successful was just amazing."

Now with Victoria's first fully-surfaced BMX track, the club has re-opened its gates to the public. Since then, the club's membership has more than doubled and visitors have been singing its praise.

"Every rider from pro down to the kids have said nothing other than this is absolutely fantastic. They're confident they can get around without the front wheel sliding out from under them.

"Basically, they just say "man, this surface is sick," says Rob.

The upgrades have attracted more kids to the track, and the club is feeling a lot more comfortable about their safety when riding. But it's the ability to race 365 days of the year that gets Rob most excited.

"We're not weather dependent anymore. It's given us that level of capability and professionalism that is above a lot of other clubs."

Being the first in the state has elevated the club's profile with BMX Victoria, the state's central BMX body. Instead of cancelling events due to poor weather, they're often relocated to Ballarat. This brings spectators into town, giving local businesses a nice boost.

"A lot of other clubs have followed suit now. They've ridden the track, seen the advantage of the surface then applied to their council, so we've pushed that barrel for everyone in Victoria as well," says Rob.

Another major benefit has been the reduction in the amount of work that goes into preparing the track before an event. Previously, the club would spend roughly six weeks wetting and rolling the surface on the track so it would maintain its shape.

"We did nothing. We basically spent two to three hours just doing the lines and blowing it off instead of six weeks of work just for one day of racing!" Rob says as he reflects from an event earlier in the year.

The upgrades have enhanced the club's racing abilities, the popularity of BMX as a sport locally, and put Ballarat front and centre on the map for the BMX community.

"We can hold state titles; we can hold national series'!"

For the years ahead, the possibilities for the Ballarat Sebastopol BMX Club are almost endless.

Public engagement

Responsible for engaging the public to educate and enable communities through phone, social media, email and by designing and delivering digital and public events. Depending on the scope or scale of your project you may need a team of five to balance the contact centre and public engagement tasks.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop community engagement strategy

The community engagement strategy is a fundamental. It outlines how the community engagement stream will respond to the broader project targets and success indicators. The strategy will provide the high-level guidance required to direct the engagement team in developing appropriate localised approaches and plans. The engagement strategy must include:

- contextual information (project background)

- engagement objectives/outcomes/targets/success indicators

- identified stakeholder groups, associated barriers to engagement and suggested tools to overcome these

- broad strategy based on process timelines

- indication of how the engagement supports the process monitoring and process evaluation.

Develop contact centre business systems

The contact centre will be critical to supporting community and their experience of your process. Ensure that calls, social media and emails are managed in a timely and effective manner. The business systems utilised to manage this will be essential for:

- handing call and email flows

- managing enquiries and escalations

- providing responses in accordance with performance targets

- regular reporting on volumes and performance of the team.

Engagement planning and logistic for awareness stage

This planning should be undertaken as per the engagement strategy and any supporting work looking at particular regions or communities targeted within your process. To deliver engagement in the awareness stage, planning and logistics work will need to be undertaken as early as possible. This will include:

- identifying opportunities to meet with key public stakeholders for advice on the process and/or engaging communities

- venue and other logistics to any public events

- requirements for supporting communications material or content.

Build your team

The public engagement and contact centre teams will need to be recruited at the beginning of the project in order to contribute to strategic and operational planning. Build out the necessary parts of your team to support communications and marketing.

Stage 2. Awareness raising

- **Test and adapt the concept, process and systems with key stakeholders and partners.**
- **Introduce the concept to the public prior to launch to generate local deliberation.**

Deliver awareness stage engagement

This engagement will be delivered as per your strategy and supporting plans for targeted regions or communities. The engagement at this stage is important for:

- Setting the expectations of stakeholders and communities about the upcoming process.

- Identifying communications and engagement opportunities for future stages.

- Feeding comments and concerns into the process development across all relevant workstreams.

Activate contact centre

The contact centre will activate at awareness stage. Ensure that the team is well supported. The team will require current process information, an understanding of accessing translation and national relay services , and processes in place to ensure that information collected at the contact centre feeds easily into other workstreams.

Review strategy and prepare for applications stage

To deliver engagement in the applications stage, planning and logistics work will need to be undertaken as early as possible. This planning should be based on the engagement strategy. This planning will include:

- identifying further opportunities to meet with key stakeholders

- enabling project partners to promote or advocate the applications stage to their communities

- venue and other logistics for community events

- arranging webinars or digital engagement as appropriate.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Review awareness stage participation

Report to your project team and management on the engagement process thus far (as per your engagement strategy). Include both community and stakeholder participation and feedback. This reporting will support future stages of the process design, communications materials, and planning for engagement. Due to resourcing requirements and workload, this task may be undertaken during quieter stages.

Deliver applications stage engagement

Deliver a range of public engagement approaches as per the engagement strategy and supporting documents. This engagement is important for:

- Further raising community awareness of your process.

- Generating enthusiasm about the opportunity to submit an idea.

- Enabling community to submit appropriate ideas.

- Identifying communications and engagement opportunities for future stages.

- Identifying community concerns or areas for process improvement.

Contact centre support

The contact centre will be managing a high volume of calls from community, stakeholders and partners at this stage. Ensure that the team are well supported with accurate and up-to-date information, and processes to connect queries or concerns with relevant parts of the broader team as required (such as technical support).

NOTE: Calls at this stage will primarily focus on access and eligibility. Input from the assessment team staff will be required when responding to grant guideline questions.

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Review applications stage participation

Report to your project team and management on the engagement process thus far (as per your engagement strategy). Include both community and stakeholder participation and feedback. This reporting will support future stages of the process design, communications materials, and planning for engagement.

Prepare for campaign and voting stage engagement

To deliver engagement in the campaign and voting stages, planning and logistics work will need to be undertaken as early as possible. This planning should be based on the engagement strategy. This planning will include:

- identifying locations and/or community groups to support (such as clusters of eligible projects and vulnerable communities)

- venue and other logistics for community events

- arranging webinars or digital engagement as appropriate.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Deliver campaign stage engagement

This stage of engagement is important for:

- Building capability for community groups to engage their communities.

- Identifying communication and engagement opportunities for future stages, especially support for vulnerable communities during the voting stage.

- Identifying community concerns or areas for process improvement.

Prepare for voting stage engagement

The delivery of engagement at voting stage, planning and logistics work should be undertaken as early as possible. This will need to include:

- identifying any further opportunities to meet key stakeholders

- enabling project groups to promote and advocate

- venue and other logistics for community events

- arranging webinars or digital engagement as appropriate.

NOTE: Work closely with the communications team, digital development team, and partnerships team to ensure that your team is well-equipped to support community in the field throughout the voting stage with clear communications, a thorough understanding of the voting process and support from local partners and stakeholders as appropriate.

Stage 6. Voting

- Encourage Victorians to browse project ideas and vote to their favourites.
- Enable all Victorians aged 16+ to vote, supporting more vulnerable communities.

Review campaign stage participation

Report to your project team and management on the engagement process thus far (as per your engagement strategy). Include both community and stakeholder participation and feedback. This reporting will support future stages of the process design, communications materials, and planning for engagement.

Deliver voting stage engagement

Engagement should be delivered as per the engagement strategy and supporting documentation. This is the most critical stage of public engagement particularly in terms of volume and diversity of participation. The engagement will be important for:

- Encouraging the general public to vote.

- Supporting more vulnerable communities with the voting process (this should be developed in collaboration with local partners where possible, but could include: local 'voting help desks' where community members can vote in person; or working with your local library network to support the use of public access computers).

NOTE: Finalising the rules and processes for voting in different conditions (such as people who aren't able to use two-factor authentication) must be determined before the engagement process can be finalised.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Review voting stage participation

Report to your project team and management on the engagement process thus far (as per your engagement strategy). Include both community and stakeholder participation and feedback. This reporting will support future stages of the process design, communications materials, and planning for engagement.

Prepare for funding agreements stage engagement

Engagement at the funding agreements stage is with the teams attached to successful project ideas—a smaller and more familiar group to engage. You will need to undertake the planning and logistics work rapidly, as you will not be able to lock down your locations until you know the voting outcomes. Planning and logistics for this stage includes:

- enabling groups to meet and discuss their projects

- venue and other logistics for community events

- arranging webinars or digital engagement as appropriate.

NOTE: Work closely with the communications team, partnerships team and grants delivery team to ensure that your team is well-equipped to support community with clear communications, a good understanding of funding agreements and support from subject matter experts as appropriate.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Deliver funding agreements stage engagement

This is a great opportunity to both upskill project teams and to celebrate their success in getting through the voting stage. This engagement is important for:

- Building capability for successful project teams to understand the funding agreement process and requirements.

- Strengthening relationships between the project teams, grants delivery team and other relevant stakeholders (such as your SMEs).

- Collecting any valuable feedback on the process undertaken to date to include in evaluation activities.

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

Review funding agreements stage participation

Report to your project team and management on the engagement process thus far (as per your engagement strategy). Include both community and stakeholder participation and feedback. This reporting will support future stages of the process design, communications materials, and planning for engagement.

Team closure

With the process now complete your teams will wind down. Ensure you are capturing lessons learned from staff as they depart and celebrating all your hard work!

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

Contribute to the evaluation process with data and process insights from the team.

Assessment

Responsible for ensuring that submitted ideas meet the eligibility criteria, have an acceptable risk profile, and have the required levels of support before they progress to voting and ultimately funding. This team requires dynamic resourcing, peaking during the assessment stage. You may need more than ten staff managing assessments full time. Some staff may be able to begin early—supporting the contact centre. Staff may also be able to transition to the grant delivery team.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Develop assessment plan

Assessment of submitted ideas underpins much of the success of your process. Ensuring permissions are sought and secured and that risk profiles are well understood before risks emerge will stand your process and reputation in good stead. Planning out your process, requirements and staffing is important to do early on.

Support prototyping and product development

The development of critical process documentation and the processes that support it will need strong input from the assessment workstream to ensure that:

- guidelines are clear and applicable

- processes capture the information required to properly assess submitted ideas

- process are built with the particular needs and user experience of assessment officers in mind.

Stage 2. Awareness raising

- Test and adapt the concept, process and systems with key stakeholders and partners.
- Introduce the concept to the public prior to launch to generate local deliberation.

Build your team

Begin the recruitment process and build out the necessary parts of your team. Based on the volumes of successful projects you may need to adjust staff numbers and tenure. Assessment team members may be suited to later support grants delivery.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Train your team

Begin to build the knowledge in your team and train officers on the assessment process. This is a great opportunity to have your assessment officers support the contact centre as they field questions about the eligibility of their ideas, and workshop ways to improve their eligibility.

NOTE: Develop a skills matrix of knowledge or experience sitting within your team and across other workstreams. This will help your assessment officers know who to ask about specific elements of a submission, for example staff may have experience with budgeting for sports equipment projects, working with local government planning policy, or an understanding of time-line and process requirements in school projects. .

Finalise process documentation and systems for assessment

Working closely with the project management, digital development and partnerships teams, finalise the processes and systems for assessing submitted ideas. Ensure that the process aligns with the grant guidelines. Allocate staff resources reflective of the anticipated number of submissions. Check that all contact details for external stakeholders and landholders are current.

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Review applications

This is a resource intensive process. Prepare your team for this by monitoring the number of submissions prior to the end of the applications stage. Ensure you have developed systems to allocate and manage the work. This could be done by spatial or categorical divisions. For example, community garden or public park projects may be managed by an officer with relevant experience or interest; or projects are grouped by a region such as a local government area. Be prepared to adapt your assessment process and build in opportunities for the team to routinely check in with you and each other over complex cases.

Assessment will likely include the following steps:

- initial assessment against eligibility criteria

- developing a risk profile for the application

- asking applicants for points of clarification

- ensuring landholder (if applicable) and partner organisation have been contacted and feedback on the idea received

- final assessment with a recommended outcome.

Finalise eligible ideas

Compile and finalise the list of eligible projects through your authorising environment. Ensure that you have adequately captured the risk profile of each project to enable an informed decision. Ensure that all relevant notes or actions that supported your decisions are recorded to allow for future access should a question about a project's assessment outcome arise.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Team closure

With the assessment process now complete your team will begin to wind down. Ensure you are capturing lessons learned from your team as they depart and celebrating all your hard work!

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Review risk on successful project list

Update your risk profiles with any new or revised advice for all successful projects. This information will be key to final approval of the successful project list.

Transition to grants delivery

Ensure your team has transitioned to grants delivery where possible, and an effective handover of materials is ready for the grants team to receive.

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

Contribute to the evaluation process with data and process insights from the team.

Grants delivery

Responsible for managing the funding of successful project ideas, including contract management, risk mitigation, communication and support. The team size will vary depending on the number of successful projects, but between four and eight staff is likely to be adequate.

Stage 1. Planning

- Identify the strategic intent and sequence of steps within the process.
- Establish governance, project resourcing requirements and timing.

Support prototyping and product development

As the workstream focused on delivery of fund and project ideas to communities it is vital that grants delivery insights and experience is incorporated into the key process documents. This includes contributions to:

- process steps, requirements and timelines
- grant guidelines and funding rules
- monitoring and evaluation framework
- applications form template
- digital systems design.

Stage 3. Applications

- Launch purpose-built website to receive applications.
- Encourage and enable all Victorians aged 16+ to submit appropriate ideas.

Support assessment team planning and processes development

Work with the assessment team on the finalisation of the assessment process and supporting systems. Plan and document a fair and transparent assessment process that takes into account:

- When applications will be assessed and by whom.
- How ineligible applications will be dealt with and by whom.
- Whether a scoring and ranking system will be used and how it may be applied.
- Recording assessment outcomes and data consistency.
- Risk profiling based on experience in delivering community grants.
- Any history of previous grants undertaken by participants with your organisation (such as how have they performed in the past and do they have outstanding milestones on other grants that would preclude their involvement in this process).

Stage 4. Assessment

- Ensure all ideas that progress to voting have met the eligibility guidelines.
- Ensure all eligible ideas have appropriate support from partners and landholders.

Support assessment team

This is a resource intensive process. Prepare to provide advice and support to the assessment team through this stage. Ensure assessment takes into account factors influencing smooth grant delivery outcomes such as:

Activities that represent value for money when measured against any relevant project objectives.

Understanding the risks that play into smooth delivery, such as local government processes (approval and permits), duration of project, and any negative impacts on community or cohesion.

The capability of the applicant to undertake the proposed activity, such as relevant technical expertise.

Stage 5. Campaigning

- Enable participants to promote their project ideas within their local communities.
- Encourage participants to consider the needs of hard to reach community members.

Build your team

Begin the recruitment process and build out the necessary parts of your team. Based on the volumes of successful projects you may need to adjust staff numbers and tenure. Assessment team members may be suited to join grants delivery.

Stage 7. Announcing successful projects

- Examine voting outcomes for accuracy and authenticity.
- Ensure all funding rules are applied appropriately.
- Communicate voting outcomes to Victorians and participants.

Finalise grants administration requirements

Grants delivery requirements should be confirmed at this stage to prepare for the funding agreements and grant delivery to come. This includes:

- Confirming the grants database is ready to receive successful project data and fields have been mapped appropriately.

- Ensuring the communications and engagement teams have a good understanding of the process and requirements to communicate to participants.

- Finalising any associated planning, reporting and milestone templates and forms.

- Finalise process documentation for your grants delivery team such as internal process for issue management and escalation, engagement logs, records-keeping processes and asset registers.

Stage 8. Funding agreements

- Enable participants to develop detailed project plans.
- Finalise funding agreements for all successful project ideas.

Support capability-building engagement

To build the skills and knowledge of successful project teams, the grants delivery team will need to provide advice on how to develop project plans that meet the needs of the funding agreements. Ensure you work closely with the engagement team and resource this engagement process adequately.

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Build out funding agreements

Build out the funding agreements using predetermined database systems and migrated data. Funding agreements may already exist in your organisation if you are a public servant. More complex projects may require longer or more detailed agreements. Important information to have in deciding the type of agreement includes:

- risk profile
- GST status (this may vary depending on the organisation)
- project type (such as infrastructure or community program).

In addition to the type of agreement, project planning documents should provide you with further important details such as:

- project timing (milestones) and detailed budgeting
- risk management
- communications, engagement and events planning.

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Confirming approvals with landholders or stakeholders

The landholder acknowledgement process that happened during assessment should be checked for currency and accuracy. Formal approval will be required to progress many of your projects depending on the scope of your process. This is critical as it may impact the project feasibility and the payment amounts.

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Review and update risk profiles for successful projects

As more detail comes to light about the successful projects, you may need to update the risk profiles you have inherited from the assessment team.

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Finalise funding agreements and execute the contract

Once the funding agreements are developed, ensure all parties have signed and the agreements have been endorsed through the authorising environment. Once this happens grant delivery and ongoing administration of these funds can take place. You may need to triage this process depending on the time sensitive nature of any projects (such as schools, or seasonal activities, or events—which can only undertake works are certain times).

Stage 9. Grants delivery

- Commence funding and grants management.
- Support and build capability of community organisations to deliver their project idea.
- Celebrate the successes of projects through events and media opportunities.

Build community capability

Help your project teams through the process and provide guidance on grants delivery. Key aspects include:

- guidance on milestones and organisation of on-site visits

- guidance in completing reports

- support for project delivery such as budget or work-flow.

Milestone reporting and site visits

Monitoring must occur over the entire duration of the project to ensure the organisation is acquitting its milestones and delivering the project. The type and frequency of these tasks is determined by the funding agreement and proportional to the risks involved and outcomes sought. A balance should be achieved between the amount of information requested (for due diligence), and the associated costs of collecting and reporting information. In all cases, full records should be maintained of materials submitted by the organisation and whether or not the information supplied has been sufficient to acquit the milestone.

Managing project risks

Ensure that project risks are identified, analysed, owned and managed appropriately. This is critical to the success of projects and managing the risk exposure of your process. Risk exposure can evolve throughout the life cycle of a project and various mitigation strategies can be employed. Key elements include:

- Having a cohesive and proactive approach to identify, assess, mitigate, report, monitor and manage project risks.

- Having a consistent approach to project risk management.

- Identifying 'blind spots' not previously identified.

- Establishing relationships with other teams and experts to manage specific risks.

Project completion and performance evaluation

All funding contracts should undergo a process at completion, expiry or termination, involving recovery of surplus funding and final evaluation of project performance. Evaluating the overall performance of a grant project and individual funding contract is the final stage in the end to end process. This is crucial for informing the design of subsequent grants processes and determining the success of this process. These evaluations are an important part of achieving best practice in grant administration and tell an important story about outcomes delivered to participants and communities through this process.

Stage 10. Evaluation

- Assess the impacts of the program.
- Identify strengths and weaknesses of the process to improve future iterations.

Evaluation services

Contribute to the evaluation process with data and process insights from the team.

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Team closure

With the process now complete your team will wind down. Ensure you are capturing lessons learned from your team as they depart and celebrating all your hard work!

Accessibility:

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