

## Notes on the “Budget Deliberative Forum” Approach

As with budget workshops, budget deliberative forums offer the public the opportunity to question, comment on, and shape a proposed local agency budget. However budget-related deliberative forums typically involve more intensive and/or longer-term facilitated processes than budget workshops, often with more time for participants to be informed about budget choices and to engage in back and forth discussions that result in concrete and usually more collective recommendations.

The distinction between budget workshops and deliberative forums is, frankly, not always easily discernible as this is often more a question of degree than of a completely different process.

However, budget deliberative forums usually involve one or more of the following:

- A longer timeline for public engagement, involving multiple meetings of participants.
- More intensive education of the participants to allow them to better understand the budget and budgeting process.
- More than one avenue for engagement, such as surveys, stakeholder group interviews, online dialogues and deliberative forums; or multi-level public forums where earlier and more general public input is developed into more detailed recommendations at a later forum.
- A central focus on “deliberation,” involving a face-to-face exchange of ideas among participants, often with the goal of developing consensus-based recommendations.

Such deliberative forums can give a significant number of community participants an opportunity to grapple with budget issues in greater depth than a shorter workshop might allow. Participants have the chance to become more informed about the issues, hear diverse perspectives, weigh budget alternatives and trade-offs, and develop recommendations for decision-makers.

When done well, deliberative public forums should yield more complete and useful recommendations with a greater degree of community support. This more in-depth engagement can help focus a community’s attention, generate new ideas, and help create support for new budget directions.

## **Keep in Mind**

This type of engagement activity requires substantial time and resources and the full understanding and support of elected officials and senior staff. Such forums typically take more time and resources than a survey or workshop. Trained facilitators are usually required to help keep groups on track, address substantive differences of opinion, and ensure that even the quieter voices are heard.

With greater public visibility may come more scrutiny of the process by the media and others, so advance planning should include a media relations plan and communication strategy. An effective communications plan will also ensure that the work and recommendations of the public forum will be known to many more residents. This is an essential element in ensuring a greater public confidence in the process and support for the resulting budget.

## **Key Elements**

These forums may be especially useful when community leaders want to engage residents in substantive conversations about how to solve structural budget deficits. By creating an intensive and/or ongoing space for face-to-face exchange of ideas and consensus building, budget deliberative forums go beyond identifying priorities to focus on specific actions and trade-offs necessary to balance a local agency’s budget.

Budget deliberative forums generally (but not always) extend over a longer time than budget workshops. They may consist of several meetings over a period of weeks or months with multiple opportunities for participation from a wide cross-section of the community. Participants are typically provided with detailed budget information and have the opportunity to grapple with the real challenges and trade-offs of budget preparation.

Like budget workshops, budget deliberative forums require good design and logistics, preparation of background materials, effective recruitment of participants, and skilled facilitation. Many local agencies that use budget deliberative forums mix them with other participatory budgeting strategies including surveys, education and outreach efforts, or consultation with stakeholder groups. A planned and coordinated set of public engagement activities extends participation opportunities to more individuals and provides decision-makers with more informed and well-considered budget visions, values and ideas.

Most agencies employ consultants to help plan and/or facilitate such forums, especially when they are seeking a greater degree of consensus on detailed budget recommendations.

This note is a service of the Institute for Local Government (ILG) whose mission is to promote good government at the local level with practical, impartial, and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities and the California State Association of Counties.

The Institute welcomes feedback on this resource:

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