Just Transition Participatory Budgeting: Pilot Phase, 2022/2023

Summary

WHAT IS PARTICIPATORY BUDGETING?

Participatory budgeting may be defined as "a budgeting practice built on the active participation of citizens in budgetary decisions with the aim of influencing resource allocation". It may involve public meetings or other forms of outreach with the purpose of enabling residents or groups of residents to develop proposals and to vote on which projects to fund. The process aims to increase transparency, accountability, and civic engagement in local resource allocation by empowering citizens to identify and prioritize needs and to allocate resources accordingly.

Green Participatory Budgeting develops this decision-making process into a system for allocating funds to projects that directly support climate change mitigation, environmental sustainability or reversing loss of biodiversity. In Scotland, Green Participatory Budgeting has been adopted as part of the strategy to achieve a Just Transition to Net Zero by supporting more people to be involved in the decisions that affect them, their communities and the environment.

THE JUST TRANSITION PARTICIPATORY BUDGETING FUND

In May 2022, the Scottish Government announced a ten year £500 million Just Transition (JT) Capital Fund to support Scotland's North East economy in its just transition to net zero. For its first year in 2022/23, £20 million was made available and of that, £1 million was subject to participatory budgeting (PB), which empowers communities to have a direct say on how money will be spent on just transition projects.

The Scottish Government held a Just Transition Participatory Budgeting (JT PB) Workshop on 28th July 2022, at the Cowdray Hall in Aberdeen City. The workshop provided an opportunity to help guide and shape the allocation of the new £1 million capital JT PB Fund for the North East. Delegates were given the opportunity to collectively consider the aspirations for the ten-year fund, the challenges in the first year and the indicators for success. It was also an opportunity to network and share knowledge and experience.

The workshop produced four core principles to help guide the Partnership in piloting an inaugural Green PB process:

PARTICIPATORY DEMOCRACY   PARTNERSHIP   SUSTAINABILITY   TRANSPARENCY

Following the workshop in July 2022, a set of objectives was drawn up for the delivery of the JT PB Fund:

- Supporting Scotland's communities in achieving a Just Transition to net-zero
- Increasing the awareness and understanding of climate change, just transitions and associated issues and activities related to the reduction of carbon footprints
- Encouraging a shift in local attitudes towards climate change/a Just Transition, raising awareness through simple messages and the provision of beneficial and desired capital projects
- Presenting opportunities for people who want to be part of a Just Transition and the climate change solution to turn their sense of joint responsibility into a real purpose
- Reducing carbon footprints and contributing to the net-zero agenda for Scotland whilst improving the health and wellbeing of both local people and their communities
- Encouraging creative ideas about local climate change/Just Transition opportunities
- Generating sustainable projects for the benefit of local people and their communities: projects that can be implemented in a short time, tailored to local peoples' needs and located where the need is felt
- Encouraging a network of green PB projects that can have a positive measurable effect on the quality of life, carbon footprint and pollution emissions in the North East of Scotland

A Partnership was set up to pilot the JTPB Fund in North East Scotland comprising of six members; three third sector interfaces (ACVO, AVA and tsiMoray), a voluntary organization that had been set up to specialise in Participatory Budgeting (Money For Moray), and a regional community climate action hub (NESCAN Hub), all assisted by the Scottish Community Development Centre (SCDC) which is the lead body for community development in Scotland. This collaboration brought together a wealth of experience and expertise in supporting the third sector across the region to help build resilience and growth within local communities. Delivering the first JT PB Fund as a partnership presented a unique opportunity to utilise excellence in innovation and communication, and to work with, and through, established and trusted community relationships built up over many years across North East Scotland.

The geographic areas covered by the JTPB Fund were; Aberdeen, the third-largest city in Scotland, with a population of around 227,000 people, Aberdeenshire, home to around 262,000 people, and Moray with a population that stands at around 96,000 people.

The total amount available for **distribution** across North East Scotland through the fund was £1m, with an allocation of £333,333 for each local authority area. Applications were invited for capital items only, with an emphasis on purchasing goods locally, where possible. All spend needed to be complete by March 2023. The fund was administered in Aberdeen City through ACVO, in Aberdeenshire through AVA, and in Moray through tsiMoray. NESCAN Hub provided support in Aberdeen City and Aberdeenshire, with Money 4 Moray supporting the process in Moray.

Criteria for eligible projects came from the following: Scottish Government Just Transition Outcomes; Scottish Government Participatory Budgeting Priorities; and local priorities as set out by the relevant local authority. Thus, to qualify, applications were required to satisfy at least one category from each of the three sets of priorities.
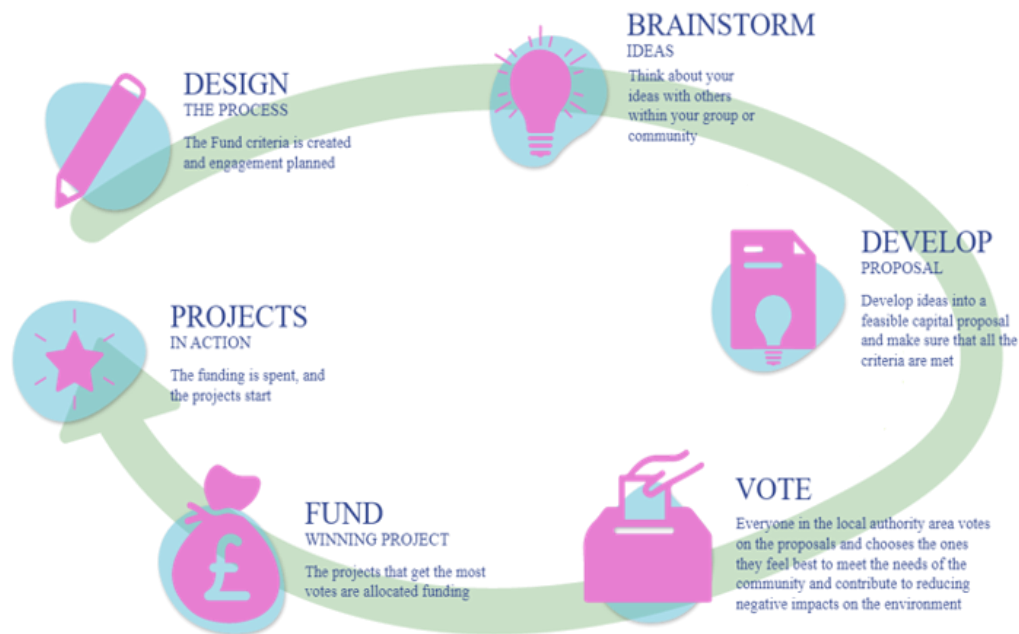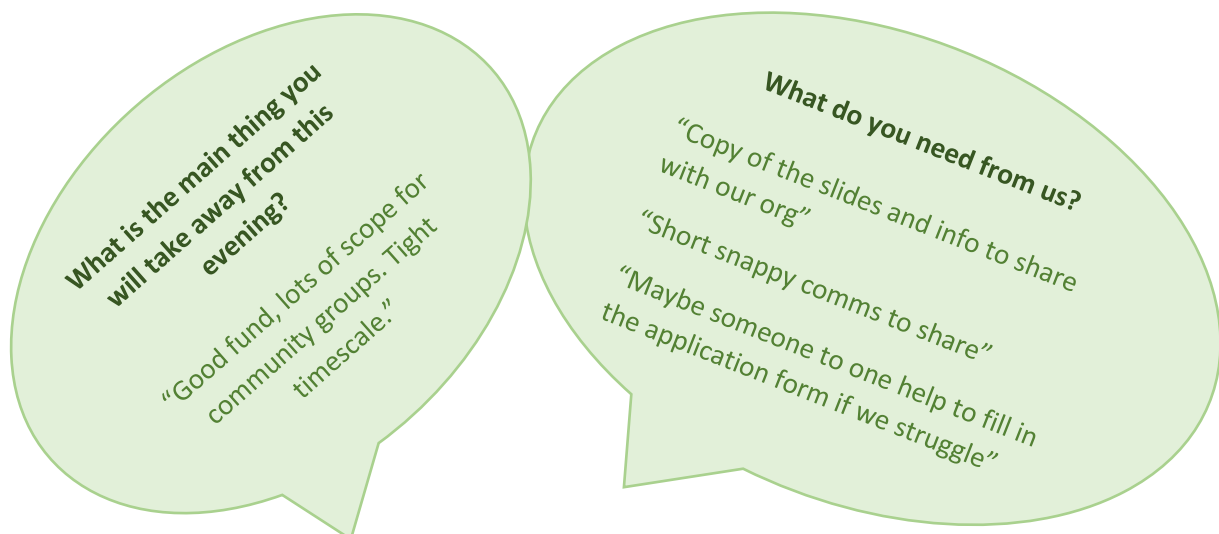
DELIVERING THE FUND

Figure 1 The various steps in the JTPB Fund process

The fund was **publicly launched** on 6th October 2022, with an online event attended by ACVO, AVA, NESCAN Hub, tsiMoray and SCDC. There were over 40 attendees at the launch drawn from a wide range of organisations throughout the third sector. An interactive tool (Slido) was used to gain insights into expectations of attendees and what they needed from the Partnership going forward. Some sample responses included:

What is the main thing you will take away from this evening?

"Good fund, lots of scope for community groups. Tight timescale."

What do you need from us?

"Copy of the slides and info to share with our org"

"Short snappy comms to share"

"Maybe someone to one help to fill in the application form if we struggle"

The launch was followed by a series of in person and online events and meetings. Many of these sessions were run jointly between at least two partner organisations. In Aberdeen, ACVO and NESCAN Hub attended both online and in person information sessions together. They also worked through existing networks to reach as diverse an audience as possible. Of particular note was outreach via contacts such as Grampian Regional Equality Council and Four Pillars.

AVA and NESCAN Hub were part of a series of joint online information sessions. NESCAN Hub also attended a range of events organised by community partnerships and groups to disseminate information about the fund through as wide a network as possible. This included engagement through Area Partnerships, Community Councils and the Community Council Forum. Feedback from the Area Partnerships included the observation that a fund based on area planning would be more beneficial to local communities, as opposed to a local authority wide approach.

Figure 2 Community information day with Bonnymuir Green

Opportunities were provided for applicants to get tailored one-to-one support through a range of channels. This included a facility on ACVO and AVA websites to submit queries, and the opportunity to speak directly to Development Officers. Drop-in sessions (online and in person) for potential applicants to discuss their ideas and receive feedback were also offered by NESCAN. This opportunity was taken up by a number of prospective applicants.

In Moray, tsiMORAY and Money for Moray held an event at Elgin Town Hall in mid-September to launch the fund, present information about the application process, timelines, support available, criteria and eligibility, and to provide the opportunity for a Q&A session. This event was attended by 39 people from 29 organisations. This was followed by a series of six, five-hour roadshow events held in Buckie, Forres, Keith, Tomintoul, Aberlour and Elgin.

These events were held to promote the Just Transition PB fund in partnership with three other funds that were currently open or were due to open: Moray's Mental Health and Wellbeing Fund (Scottish Government), the Community Wellbeing Participatory Grant Making Fund (in partnership with the National Lottery), and the Communities fund. This approach worked well helping those groups attending to decide which fund suited their

needs best for applications and this brought in more attendees. Timings were arranged to cover afternoons and evenings (held from 3-8 pm) to be inclusive.

Groups were invited to **submit their applications** electronically through the websites of the third sector interfaces (TSIs) through a system that was designed and overseen by AVA. Interactive forms, designed through JotForm, were used for application. Some groups requested downloadable forms to be able to plan their applications and seek feedback from others in their group, and from Partnership staff offering guidance and support with completing the form. Although partially completed online forms could be saved and returned to later, this did not allow easy input from collaborative groups, especially as people were primarily interacting online (due to wide geographic area and the ongoing impact of Covid).

There were some key differences in questions between the application forms used in the three local authority areas. In some cases, the omission of key questions generated considerable additional administration to seek clarification after the application process had closed. Building on the learning from the assessment of project submissions, some key questions which could be useful to include in the next iteration of application forms are:

- What is the name of your project?
- What is the timeline for your project and what assurances can you provide that the funds can be spent before the end of the financial year?
- What consideration have you given to whether planning or other permission may be required and are all relevant permissions in place?
- Please provide a full breakdown of costs for your project.

In summary, there were:

- 39 applications across Aberdeen City, totalling £1,057,130.68.
- More than 54 applications across Aberdeenshire, totalling over £1,047,251.50.
- 34 applications in Moray, totalling £989,382.09.

For the **voting process**, brief summary information for each project within the relevant local authority area was displayed on the voting web page of the corresponding TSI website i.e., all Aberdeen City projects were listed on the ACVO website and all Aberdeenshire projects were listed on the AVA website etc. Project information was displayed in slightly different ways across the websites, for example, the AVA website contained a geographic map of projects, in addition to summary text. This was not a feature of the ACVO website.

Every resident within a local authority area was given the opportunity to vote on the projects within their region. Both ACVO and AVA voting platforms required residents to input their postcode to verify eligibility to vote. Voters across all three regions were required to cast votes for ten discrete projects. Attempts to vote for a project more than once invalidated the voting attempt. The use of this "spread voting" format was employed to provide a degree of support for organisations that may be disadvantaged, for example, due to their size, geographic location etc. as it was likely that they would have greater

difficulty mobilising support than more established/larger organisations. Although the use of spread voting prevented residents from voting solely for their "favourite" projects or those they recognised most readily, being required to cast ten votes was perhaps the single most widely cited criticism of the voting process across Aberdeen and Aberdeenshire. Anecdotal evidence suggested many residents who initially attempted the voting process gave up when required to select such a large number of projects.

Much of the publicity around voting was undertaken digitally across Aberdeen City and Aberdeenshire, mainly due to time constraints. Partners disseminated information through an extensive network of contacts such as Community Councils, Parent Teacher Councils, Local Authority contacts etc. Social media was also employed to highlight the opportunity to vote. NESCAN Hub distributed flyers throughout local libraries, community halls and key service providers.

Time was a very significant factor in organising in-person voting events in Aberdeen City and Aberdeenshire. A small number of in-person events took place in Aberdeen. In Moray, a physical in-person "marketplace" event was held, where organisations had the opportunity to showcase their projects. Although there was limited footfall from local residents, participating organisations welcomed the opportunity and reported a considerable benefit from networking.

Figure 3 Marketplace event held by partners in Moray

RESULTS

Most of the projects that came forward for consideration under the fund, and were subsequently successful, were projects that were ready to be taken off the shelf and required little complex planning. The short lead-in time was a barrier to more complex projects coming forward. Successful projects tended to focus on buying materials that could

be used immediately and did not involve projects that developed new skills, required planning permission or were predicated on other elements of the project being achieved.

JUSTTRANSITION

PARTICIPATORY BUDGETING FUND

in 2022......

1 Million

pounds spent on local community climate action

130

approximate number of applications submitted to the fund in its first year

45

community groups received funding to make their ideas happen

10,000

voters took part across Aberdeen City, Aberdeenshire and Moray

acvo · tsi · NESCAN · money for moray

Project proposals were largely grouped into three main areas; electric vehicles; retrofitting; and greenspaces. There were also some miscellaneous submissions, mostly concentrated across Aberdeenshire. In general, applications for electric vehicles and community greenspaces/biodiversity were more successful in the voting stage than retrofitting projects.

There is clearly a strong need for funding support to retrofit community buildings, which Green PB may not be able to fulfill. This provides a message for central and local government. The Partnership also has a role to play in signposting to funds that could help with such projects.

Of the applications for electric vehicles, five of the six successful applications in Aberdeen were from large established city-wide organisations, and the sixth from a Community Council. The relatively high funding limit may have favoured proposals for electric vehicles (it was a good "fit" in terms of cost) and the city-wide voting process may have favoured larger, more established and well-known organisations.

Many of the successful applications submitted by established, well-known organisations were from social enterprises. Many of the larger organisations are skilled in applying for funding, potentially with dedicated staff members employed in this role. Those projects that were unsuccessful tended to come from young people, religious groups, or ethnic minority groups. It was notable that a range of applications was submitted by under-represented groups, helped by Partnership support to get them to the voting stage. However, these projects failed to achieve sufficient support at the public vote and the Partnership needs to look at what more it can do to support under-represented groups at

this critical stage. This may involve reviewing voting criteria - one example is potentially allowing residents from one local authority area to vote for their place of worship based in another authority area. It may also involve adjusting the voting structure to overcome inequalities.

More details about the successful projects from Year 1. in Aberdeen City can be viewed here Just Transition PB Fund - Projects from year 1 - ACVO TSI. Successful projects from Aberdeenshire can be viewed here Just Transition Fund 1 (avashire.org.uk), with projects from Moray available to view here Just Transition Fund | tsiMORAY.

IMPACT

The impact of the £1m funding received by projects across North East Scotland can be viewed in several ways, and it will be interesting to follow the successful communities of place and interest on their journey as they move towards implementing their plans.

The funding of electric vehicles will have a demonstrable impact on the reduction of carbon emissions. For some projects, this will benefit single organisations, or projects, reducing the amount of mileage powered by fossil fuels used by that organisations. However, for other projects, the impact will be magnified as the vehicle is intended to be used by multiple community groups e.g., Tillydrone Community Council's purchase of an electrical vehicle to facilitate a range of critical services within the community.

Projects involving the retrofitting of equipment to make buildings more energy efficient have clear, quantifiable carbon emission reduction benefits. Where demonstration projects were successful, such as Greener Kemnay's application for the purchase of equipment to identify heat loss within local homes, the impact may be greater. By disseminating information across wider Aberdeenshire, multiple residents could see an improvement in the energy efficiency of their homes, and lower bills.

Projects focusing on the natural environment (enhancement/creation) serve to contribute to a move towards net zero through carbon sequestration e.g., restoration of peatland and creation of woodland by Scottish Wildlife Trust local group. But they also help build capacity through knowledge and skills transfer encouraging communities to take ownership of their local greenspace and contribute to carbon reduction through greenspace enhancement.

Additionally, impact can be viewed through social and economic enhancement. For example, the benefit of social cohesion, or development of skills that can enhance employability. However, these impacts can be difficult to measure, particularly in the first year of a project with little time to design an appropriate evaluation strategy. In future years we hope to be able to look much wider than projects funded, money dispersed, number of people engaged, and look at the wider impact of the Green PB process in helping create engaged and deliberative communities, building confidence to understand and plan for climate change. Potentially, the PB framework and charter could be used to devise a Monitoring, Evaluation and Learning strategy to help us measure these impacts.

In summary, through sustained and collaborative effort from the Partnership, some great projects came through in the first year, greatly exceeding expectations. However, a longer lead-in time, and increased funding, would allow the Partnership to work with more communities, increasing the scope (and therefore the impact) of the JTPB Fund on the transition towards net zero in North East Scotland.

MONITORING, EVALUATION AND LEARNING

Systems for **gathering data** were established at various points throughout the project. These included both quantitative and qualitative methods. Although imperfect in their execution e.g., methods were not adopted uniformly, or some partners had difficulty accessing the communication platforms, nevertheless, some valuable data were collected identifying areas where the process could be improved for the next round. Some examples of data collection are highlighted below:

As the delivery of the project got underway, NESCAN Hub staff created a **learning log** to document challenges at each stage of the process. It was helpful to identify these challenges in real time, as issues can be difficult to recall as the project progresses. These learning points were fed back to partners at the Ministerial meeting in January, and subsequent joint partner meetings. They have also helped contribute to this report and the recommendations contained within.

AVA sent out a simple **feedback questionnaire** on 12 January 2023, following the publication of the overall vote outcome via email to those who wanted to be kept in the loop. There were 66 responses to the questionnaire. Some of the main points are summarised below:

On a scale of 1 (very easy) to 4 (very difficult), over half of respondents rated the process as 1 or 2, though 27 respondents (41%) scored this question towards the more difficult end of the scale (3 or 4).
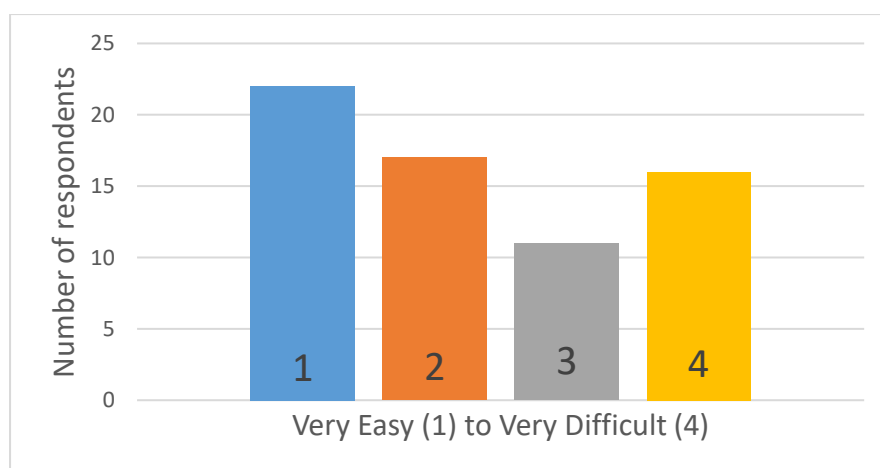

Figure 4 Figure 4. Responses to the question, "How easy did you find the voting process? (1 being very easy, to 4 being very difficult)".

Several suggestions for improving the voting process were made. The strongest theme was that having project descriptions on a separate page to the voting page made it difficult to keep track of which or how many projects one had already voted for and required considerable swapping back and forth between screens. Several respondents blamed the high rate of invalid votes on this issue. Suggestions for reducing this included having a tick box next to project descriptions and removing the voting option from projects already voted for. One respondent suggested that first page could allow voters to tick projects to from a shortlist and then, on the next page, drag and drop those selected into position or preference (so that the top ten selected then becomes clear).

A key issue explicitly flagged by 10 respondents was that they felt that 10 projects was too many to vote for, as they only had interest in a smaller number of projects. They expressed concern that after selecting chosen projects, others may be selected at random, or the next nine on the list may simply have been chosen to complete the process. One respondent commented that successful projects appeared to be those early in the alphabet and suspected that they may have been favoured by this process.

Respondents were asked for further feedback on the process in general. A recurring comment was the perception that the process favoured larger projects, with larger organisations behind them able to mobilise voters. They felt that projects from smaller organisations (many of which may have requested smaller pots of money) were disadvantaged. Similarly, some felt that projects based in larger centres of population where they might be known to a greater number of people were advantaged over more rural-based projects. A range of suggestions was made for addressing this, especially ideas based on having categories for different sized projects (based on funds requested) and weighting votes depending on the funds requested. There was also a suggestion to work with some of the smaller organisations to help them improve the quality of their applications.

Some respondents recognised the constrained timescale in which the project was delivered and offered praise for the successful completion of the process.

> *"This seems like a process that could and should go from strength to strength"*

A **celebration event** was held in Elgin Town Hall in January following the announcement of the results of the public vote. The purpose of the event was twofold; a celebration of the awarding of funds to projects across Moray, and an opportunity to reflect on personal experiences of the Just Transition Fund PB process. At this in-person event, which was attended by representatives from successful and unsuccessful applicants, two main themes were discussed: what worked well during the process, and what elements could be improved. Additionally, feedback was invited from applicants who were not able to attend the event - four groups provided written feedback.

The collective feedback highlighted some key areas where improvements could be made to future funding rounds. One of the recurrent themes was the amount of time required to promote and get votes, which can be especially challenging for smaller groups. It was suggested mentors could be helpful in supporting these groups to succeed.

Short timescales were also cited as a barrier across other areas of the process, including submitting applications and spending the money. The feedback also suggests that small communities are disadvantaged in the voting system, with several respondents advocating for a dual or multi-tier fund:

> *"Allocate a third of the fund to small communities sub-1000 population – we can't compete in voting against main population centres"*

> *"Possible 'band' funding grants e.g., vote for 3 in 50K or 10 in £10k"*

However, overall, the funding opportunity was considered beneficial, and the online application and voting process were appreciated, along with the networking opportunities provided by the marketplace. The feedback also suggested that that the online application process was clear, and good support was provided by the administration teams.

> *"I found the application form easy and the admin team behind it very helpful. I was able to ask for advice and felt guided through the process"*

A simple JotForm **survey** was sent out post-results to the projects that took part in the voting process in Moray. This provided 15 responses, of which eight were successful in receiving funding and seven were not successful. Ten responses were from smaller projects (income <£50,000/year) and five from larger projects. Responses were mixed regarding how well publicised the fund was with some reporting a good level of publicity and others reporting that, among the general public at least, there was a low level of awareness. Respondents ranked the tsiMORAY Bulletin and word of mouth as the most frequent ways in which they learned of the project. Nine of the 15 respondents found the application process to be easy and fewer than half accessed help from tsiMORAY or Money for Moray.

Nine respondents rated the voting process highly, giving it a 4 or a 5 out of 5, though four gave the lowest score of 1. There were numerous positive comments regarding the process and the engagement with people which this generated. However, there were also perceptions that projects from larger settlements or larger organisations were unfairly advantaged.

The majority of respondents gave a good rating to the marketplace event in Elgin on 8 December 2022 and commented in general that the event was good for networking, though poorly attended by the public.

Overall, there was appreciation and enthusiasm for the process from respondents that were successful and some frustrations from others, with again a perception that larger settlements (Elgin and Forres especially) were unfairly advantaged. Suggestions for

improving the process included a range of comments regarding amending the voting process (e.g. needing to vote for fewer projects, having more regional voting and reducing the public vote element in favour of a panel) as well as requests to lengthen the time for application to the fund.

As part of the evaluation process, NESCAN Hub offered to lead **focus group** sessions in conjunction with ACVO and AVA to get detailed feedback from applicants. Anecdotal evidence had suggested that some potential voters in both Aberdeen and Aberdeenshire had failed to complete the voting process despite initial attempts to do so. Identifying the reasons for disengagement was seen as a valuable learning opportunity.

There was a delay in getting consensus on running focus groups and, subsequently, recruiting participants for the sessions. Recruitment was particularly challenging as there was no data sharing agreement in place to allow follow-up with applicants. A call for participants was made through social media, highlighting that focus groups were aimed only at those who had been involved as an applicant, or voter, in the Green PB process. A £15 Aberdeen Gift Card was offered as an incentive for taking part, however, this led to a very high volume of spam emails to the contact email address, with little useful leads for recruitment.

ACVO forwarded an email on behalf of NESCAN Hub to applicants in the Aberdeen area highlighting the opportunity to provide feedback. Six projects responded, three that had been successful and three that had been unsuccessful. Having a mix of those that received funding, and those that didn't, was a good opportunity to record different perspectives. NESCAN Hub and ACVO staff informally asked contacts who had voted if they would be willing to be part of a voters' focus group. Although several participants initially got in touch to suggest they were willing to be part of a discussion, only three attended the online session on the day. However, they provided detailed feedback and made suggestions for improvement for subsequent funding rounds.

Both focus groups were asked to consider several key themes:

- Communication channels
- Terminology
- Previous experience of PB
- Support during application and the application process
- Publicity, including promotion of the voting process
- Suggestions to improve future rounds

Although this was a very small sample size, feedback was generally consistent with feedback provided informally to partners, and consistent across successful and unsuccessful applicants.

Main points that were highlighted during the discussions were:

- Voting favoured social enterprises and recognisable "names" - "popularity contest"

- Name of the fund did not resonate with applicants or voters - "I didn't think the fund applied to me"
- Applicants felt partners had provided good support during the process
- Ten votes were too many – after first two or three votes, process became less meaningful
- There was strong advocacy for two, or multi-tier funding to help smaller groups
- Green PB was felt to be a good way of distributing money (one or two disagreed)
- Voters felt empowered - "I felt like I was making a difference"

POSITIVE OUTCOMES

Piloting a Green PB Fund of this magnitude, both in terms of geographic reach and funding resource, was very much an unknown quantity for the Partnership. In the lead up to the application deadline, the hope and concern was that there would be sufficient uptake of the fund to create a participatory process. However, the reality greatly surpassed that hope with the fund significantly oversubscribed in each local authority area; funding applied for was around three times greater than the amount available through the fund (applications totalled around £3m).

This signalled that the fund had caught the imagination of the residents of Aberdeen City, Aberdeenshire and Moray, and galvanised local communities into submitting a wide range of projects in support of positive climate action. Given the support for the Green PB process in this pilot year, there is clearly an opportunity to scale up the action in future years, reaching out further into communities and building a movement that can be implemented not only through this fund, but providing a model for democratic decision-making across a range of municipal instruments.

A clear benefit of this pilot is the funding of significant community-led climate action. One million pounds worth of investment has enabled community groups to take forward action that may otherwise have gone unfunded or have taken a much greater time scale to achieve. Some of the projects have the potential for significant legacy value, helping build green skills within the community or providing a resource that can be shared amongst multiple groups.

Successful projects can also act as a source of inspiration for future applications, motivating community members to come together to develop ideas and submit their own proposals. As projects from the pilot round move into the development phase, there is a great opportunity to showcase their journey through multi-media, including digital storytelling.

Through the experiences of the Partnership, the applicants, and the voters across all three local authority areas, a baseline can be drawn up from which to measure future progress. Looking across engagement, feedback, voting outcomes and a range of other metrics, the Partnership can work to make improvements year on year to help achieve the objectives of the Green PB Fund more effectively. It can also provide a starting point from which to

monitor the growing of a movement which has the potential to bring transformational change to the environment and the lives of those it supports.

CHALLENGES

The short lead-in time was universally acknowledged as the most substantive challenge throughout the process; stakeholders across the spectrum cited time constraints as having a significant negative impact in several areas:

- forming a new inter-agency partnership;
- launching and delivering a campaign;
- designing a community project and applying within the fund deadline;
- raising awareness amongst potential voters and "getting the vote out";
- and finally spending the grants before the end of the financial year.

Although the collaboration brought together partners with a unique mix of specialist skills, strong community connections and experience of deliberative processes, including participatory budgeting, the timescale available to develop the partnership and optimise organisational strengths presented a significant challenge. SCDC played a key role in working to bring partners togethers during this time. Through funding provided by Scottish Government to give capacity and support to the North East partnership in year one, they offered bespoke training and learning for partners, and facilitated shared learning days, giving space and time to explore the opportunities and challenges faced during the process. SCDC were also involved in several community sessions, sharing their knowledge and experience of PB to help communities gain an understanding of the process. Additionally, they were on hand to provide guidance and advice where sought by partners.

Despite the challenge of forming and operating as a new collaboration, an incredible amount was achieved, with partners reflecting on the success of the fund at post-project meetings, with a resolve to work together to strengthen the Partnership going forward.

Rolling out the project within a tight timeframe also presented several operational challenges. With competing work strands and stretched organisational resources, it proved difficult to resource various stages of the project. In some instances, new staff were recruited specifically for the implementation of the project, with little time to familiarise themselves with what was required. Whilst, for other staff, concurrently working on other projects presented a very challenging workload.

Clear communication channels are the keystone to partnership working and this was an area that presented significant challenges for the newly formed collaboration. Although some of the partners had worked together previously, there had not been ample opportunity prior to the launch of the fund to develop agreed ways of working. In particular, the failure to identify and implement a communication system that was user-friendly across the partnership hindered knowledge-sharing and the ability to effectively target resources. This led, at times, to confusion over roles and responsibilities and made it difficult to plan joint meetings. Although inter-partner communication was a challenge, it has provided a

significant learning opportunity, and one that partners feel can be overcome as the Partnership grows.

Although the need to engage with **diverse audiences** was recognised from the outset, it was difficult to develop and implement a robust approach within the very limited timeframe. To overcome this, partners pooled their contacts and worked with established organisations such as Four Pillars and GREC to run events. There was also significant attempt to establish new contacts, however, relationships take time to build and there was limited response when reaching out to some minority organisations. A number of minority groups did work with partners including NESCAN Hub and ACVO to develop and submit projects that were successful in reaching the voting stage. However, these often failed to achieve support from the general public during the voting process. It is recommended that providing tailored support for minority groups at this stage of the process should be a key priority going forward.

RECOMMENDATIONS

Key recommendations from the development and delivery of the inaugural Just Transition Participatory Budgeting Fund for North East Scotland:

- Formalise a long-term vision and objectives for the Fund including, for example, raising community awareness and understanding of the coming transition & the growing impact of climate change.
- Co-create a Partnership Agreement that lays the foundation for a culture of collaboration with opportunities to build working relationships, continuous learning and transparency. Include clear roles and responsibilities, a data-sharing agreement and agreed ways of working.
- Develop leads for areas of work, optimising skills and experiences and ensuring there is opportunity for all partners to input on decision-making.
- Discuss accessibility of the Fund name.
- Review and create clear criteria for qualifying organisations.
- Review the structure of the Fund with clear objectives for any adjustment. For example: changing the funding cap; exploring the potential for dual/multi-tier application process; exploring thematic and place-based criteria.
- Consider strategies to embed deliberation in the Just Transition Participatory Budgeting process.
- Identify and remove potential barriers such as local authority priorities.
- Consider a Monitoring, Evaluation and Learning strategy that aligns with the indicators outlined in the Scottish PB framework and Charter (Appendices 1&2)
- Develop evaluation methods, including collation of quantitative and qualitative data, to be used across the Partnership.
- Review the systems used for implementation and investigate alternatives where possible using an evidence-based approach e.g., voting platform, voting methods, number of votes etc.

- Design a Communications Plan at the beginning of the project to support delivery at every stage of the process.
- Design and maintain a project plan including milestones, feedback mechanisms and a risk register that can be used as part of project planning
- Develop an equalities and diversity strategy for the Fund.