

MODULE 5



BUDGET ADVOCACY PART I: PLANNING FOR BUDGET ADVOCACY

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SUMMARY TABLE

<p>Duration of this module</p>	<p>9 hours, 45 minutes (Parts I, II, and III) 13 hours, 10 minutes (Budget Advocacy Group Work & Presentations)</p>
<p>Structure & timing of this module</p>	<p>This module corresponds with the following sessions in the <i>Health & Budgets Training Workshop Agenda</i>:</p> <p><u>Part I: Planning for Budget Advocacy (3 hours, 30 min.)</u></p> <ul style="list-style-type: none"> • Part of SESSION 4 on Day 2; • Part of SESSION 1 on Day 3; and • Part of Session 2 on Day 3. <p><u>Part II: Power, Stakeholder, and Opportunity Mapping (3 hours, 30 min.)</u></p> <ul style="list-style-type: none"> • Part of SESSION 2 on Day 4; • SESSION 3 on Day 4; and • Part of SESSION 4 on Day 4. <p><u>Part III: Media and Communications (2 hours, 45 min.)</u></p> <ul style="list-style-type: none"> • SESSION 2 on Day 6; and • Part of SESSION 3 on Day 6. <p><u>Part IV: Budget Advocacy Group Work and Presentations (13 hours, 10 min.)</u></p> <ul style="list-style-type: none"> • Part of SESSION 3 on Day 6; • SESSION 4 on Day 6; • SESSIONS 1-4 on Day 7; • SESSIONS 1-2 on Day 8; and • Part of SESSION 3 on Day 8. <p>(Note that one session is 1 hour, 45 minutes.)</p>
<p>Resources needed for PART I</p>	<ul style="list-style-type: none"> • Flipchart paper and markers • Masking tape • Polarus Sourcebooks • Word Wise Web cards • PowerPoint presentations: <ul style="list-style-type: none"> ➤ MODULE 5 – Budget Advocacy Part I – Presentation #1

	<ul style="list-style-type: none">➤ MODULE 5 – Budget Advocacy Part I – Presentation #2• In the Participants’ Workbooks:<ul style="list-style-type: none">➤ TASK 5.1 ■ Sharpening a Budget Advocacy Objective➤ TASK 5.2 ■ Uncover the Research Agenda➤ TASK 5.3 ■ Identifying Our Budget Problem and Related Budget Questions➤ TASK 5.4 ■ A SMART Advocacy Objective on Health Care in Sunrise State➤ TASK 5.5 ■ Assessment Form: How SMART Is This Advocacy Objective?➤ READING 5.1 ■ Sharpening a Budget Advocacy Objective➤ READING 5.2 ■ Evidence-based Budget Advocacy➤ READING 5.3 ■ Research for Advocacy: OBI 2010➤ READING 5.4 ■ Questions to Guide Budget Research
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LEARNING OUTCOMES TO BE ACHIEVED

By the end of this Module, participants will have:

- Distinguished the key elements and importance of an advocacy strategy;
- Formulated a strategic objective and made it SMART;
- Appreciated the value of evidence-based advocacy;
- Recognized the need to sharpen and add substance to advocacy strategies by examining the budget dimension of development problems;
- Identified powerbrokers in the budget process;
- Developed a power map and an opportunity schedule for their advocacy plan;
- Developed SMART advocacy objectives;
- Recognized why message development is important in budget advocacy;
- Formulated a clear budget advocacy message;
- Recognized why it is important to work with the media in an advocacy campaign;
- Summarized different types of media and differentiated the roles within the news media;
- Explained various techniques for gaining media attention;
- Matched media publicity to the budget cycle;
- Considered how to gear message delivery to specific contexts and time constraints;
- Practiced building a coherent budget advocacy strategy to address a development problem; and
- Prepared and refined a budget advocacy presentation.

STRUCTURE OF THE MODULE

PART I: Planning for Budget Advocacy (3 hours, 30 minutes)

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| 1. BRAINSTORM: Why We Do Budget Advocacy | 10 minutes |
| 2. FACILITATOR INPUT: Developing a Budget Advocacy Objective | 20 minutes |
| 3. ENERGIZER: Word Wise Web | 15 minutes |
| 4. TASK 5.1 ■ Sharpening a Budget Advocacy Objective | 20 minutes |
| 5. FACILITATOR INPUT: Research for Advocacy | 10 minutes |
| 6. TASK 5.2 ■ Uncover the Research Agenda | 30 minutes |
| 7. PLENARY CHECK-IN: Back to Sunrise State | 10 minutes |
| 8. TASK 5.3 ■ Identifying Our Budget Problem and Related Budget Questions | 15 minutes |

9. **FACILITATOR INPUT:** Adding the Budget Dimension 15 minutes
10. **TASK 5.4** ■ A SMART Advocacy Objective on Health Care in Sunrise State 20 minutes
11. **TASK 5.5** ■ Assessment Form: How SMART Is This Advocacy Objective?:
Peer Group Feedback and Consensus 30 minutes
12. **PLENARY DISCUSSION** 15 minutes

PART II: Power, Stakeholder, and Opportunity Mapping (3 hours, 30 minutes)

1. **RECAP AND GOING FORWARD:** Budget Advocacy 5 minutes
2. **FACILITATOR INPUT:** Focusing Our Advocacy Plan 15 minutes
3. **FACILITATOR INPUT:** SWOT Analysis 15 minutes
4. **TASK 5.6** ■ SWOT Analysis 20 minutes
5. **FACILITATOR INPUT:** Powerbrokers in the Budget Process 15 minutes
6. **TASK 5.7** ■ Powerbrokers in Sunrise State 20 minutes
7. **FACILITATOR INPUT:** Stakeholder Analysis 35 minutes
8. **TASK 5.8** ■ Stakeholder Analysis for Sunrise State 25 minutes
9. **FACILITATOR INPUT:** Power and Opportunity Schedule 30 minutes
10. **TASK 5.9** ■ Power Mapping and Opportunity Schedule 30 minutes

PART III: Media and Communications (2 hours, 45 minutes)

1. **ENERGIZER:** Eliminating Jargon 10 minutes
2. **BRAINSTORM AND DISCUSSION:** Why Work with the Media? 20 minutes
3. **FACILITATOR INPUT AND DISCUSSION:** The Changing Media Environment 10 minutes
4. **TASK 5.10** ■ Media Strengths and Weaknesses 10 minutes
5. **TASK 5.11** ■ Media Delivery Wheel Scenarios 20 minutes
6. **INDIVIDUAL READING:** Guidelines for Working with Media 45 minutes
8. **FACILITATOR INPUT:** Working with New Media 10 minutes
9. **TAKE-A-WALK:** Sharing Experiences of New Media 20 minutes
10. **ROUNDTABLE:** Engaging with the Media – Practical Tips 20 minutes

PART IV: Budget Advocacy Group Work & Presentations (13 hours, 10 minutes)

1. **TASK 5.12:** Presentation of Your Budget Research Findings 5 hours, 15 minutes
2. Group Work Presentations I and Feedback 1 hour, 20 minutes
3. **TASK 5.13:** Budget Advocacy Presentations and Media Tasks 5 hours, 15 minutes
4. Group Work Presentations II and Feedback 1 hour, 20 minutes

DEVELOPING AN ADVOCACY OBJECTIVE

Duration of session: 1 hour, 5 minutes

STRUCTURE OF THE SESSION

1. BRAINSTORM	10 minutes
2. FACILITATOR INPUT	20 minutes
3. ENERGIZER: Word Wise Web	15 minutes
4. TASK 5.1 ■ Sharpening a Budget Advocacy Objective	20 minutes

The aims of this session are for participants to:

- Understand the key elements of an advocacy strategy;
- Practice drafting strategic budget objectives; and
- Recognize the relevance and importance of developing a budget advocacy strategy.

1. BRAINSTORM

10 MINUTES

Ask participants to brainstorm responses to these two questions:

- Why do we do budget advocacy?
- What do we aim to achieve with budget advocacy?

The questions may seem to say the same thing, but they are aiming for different answers. However the answers come from participants, check that the following are covered:

- Why do we do budget advocacy? To bring about:
 - Policy, legal, and systems changes and improvements
 - Changes in power relations
 - Improved changes in transparency, accountability, and civic participation
- What do we aim to achieve with budget advocacy?
 - To ultimately improve the well-being of poor and marginalized populations
 - In this context also to help ensure that people's right to health is more fully realized

2. FACILITATOR INPUT: DEVELOPING A BUDGET ADVOCACY OBJECTIVE

20 MINUTES

- **The aim of the facilitator input** is to:
 - Introduce participants to the components of a budget advocacy strategy; and
 - Illustrate how to develop a SMART budget advocacy objective.
- **Note:** This input is supported by the PPT file **MODULE 5 – Budget Advocacy Part I – Presentation #1**.
- An advocacy strategy has five components (**Slide 3**):
 - *A strategic analysis.* The workshop will address developing a strategic analysis in Module 5 - Part II, as part of the SWOT exercise.
 - *An advocacy objective.* Developing an advocacy objective is the principal focus of this session.
 - *A stakeholder analysis.* Module 5 - Part II focuses on developing a stakeholder analysis. In summary form, it is important to identify the primary audience for your advocacy as well as secondary audiences.
 - *An advocacy message* (development and delivery). Developing an advocacy message is addressed in Module 5 - Part III. Here participants will just be introduced to what an effective budget advocacy message should do, the three principal components of it, and considerations about messengers and mediums for delivering the message.
 - *A schedule.* This is also addressed in Module 5 - Part III, with a particular focus there on an opportunity schedule.
- Notes to support **Slides 4-8** of the presentation are in **READING 5.1 ■ SHARPENING A BUDGET ADVOCACY OBJECTIVE**. Advise participants that they can find information on the content of this presentation in their Workbooks in **READING 5.1**.

3. ENERGIZER: WORD WISE WEB

15 MINUTES

- **Aim:** To add an informal and fun dimension to the session, while also giving participants a task to reflect on their learning in the session.
- Photocopy the words of the WWW at the end of this session, and cut the sheets up so that each word is on a different piece of paper or card. This will allow participants to move the words around to form a sentence.
- Divide participants into groups of 4. There should be a full set of cards for each group.

Give each group a set of WWW cards and invite them to rearrange the words to form a sentence.

- Hint to participants: The solution is a completed objective, incorporating all the SMART components.
- This answer is: *GOVERNMENT MUST PLAN TO IMPLEMENT AND SPEND \$500,000 FOR THE PROVISION OF ANTI-RETROVIRAL TREATMENT FOR ALL HIV INFECTED CHILDREN IN THE COUNTRY BY 2011.*

4. TASK 5.1 ■ SHARPENING A BUDGET ADVOCACY OBJECTIVE **20 MINUTES**

- Allocate to each group one of the following objectives:
 1. The government will increase the health budget.
 2. The government will spend enough to reduce maternal mortality.
 3. The government will increase access to primary care facilities.
 4. The Parliament will participate more in budget decision-making.
- Ask participants to turn to **TASK 5.1 ■ SHARPENING A BUDGET ADVOCACY OBJECTIVE** in their Workbooks. Ask the participants to sharpen their allocated objectives so that they become SMART budget advocacy objectives.
- After approximately 10 minutes, facilitate a report-back and discussion. Ask for a maximum of two volunteers to share their SMART objectives. Spend 10 minutes responding to the inputs from the two volunteers.

SUGGESTED ANSWERS TO TASK 5.1: SHARPENING A BUDGET ADVOCACY OBJECTIVE

Some suggestions for how these objectives could be sharpened:

1. Government will increase its total health budget by an annual average rate of 5% over the next four years.
2. The Ministry of Health will develop and plan a program for the prevention of maternal mortality and will allocate between 1% and 2% of each of its regional budgets for this program between 2010 and 2015.
3. Over the next five years the Ministry of Health will increase the number of primary health clinics by 10%, targeting those areas of the country where the population has to travel, on average, more than 20 km. to reach a primary health clinic.

4. Within 2 years, during the discussion of the Executive's Budget Proposal, the Parliament Budget Committee will hold public hearings on the budgets of key central government departments in the social sector (Education, Health, Welfare), in which testimony from the public and the executive is heard.
- To summarize and draw this part of the session to a close, ask participants if their SMART objectives answers all of the following questions:
 - What does the group want to achieve?
 - How will they achieve it?
 - Does the objective have a timeline?
 - Once the group has achieved their objective, how will they be able to measure their success?
 - Does the objective provide numbers, dates and amounts?
 - Does it state where (geographic area)?
 - Does it state who should take the action?

CONDUCTING RESEARCH FOR ADVOCACY

Duration of session: 2 hours, 25 minutes

STRUCTURE OF THIS SESSION

1. FACILITATOR INPUT: Research for Advocacy	10 minutes
2. TASK 5.2 ■ Uncover the Research Agenda	30 minutes
3. PLENARY CHECK-IN: Back to Sunrise State	10 minutes
4. TASK 5.3 ■ Identifying Our Budget Problem & Related Budget Questions	15 minutes
5. FACILITATOR INPUT: Adding the Budget Dimension	15 minutes
6. TASK 5.4 ■ A SMART Advocacy Objective on Health Care in Sunrise State	20 minutes
7. TASK 5.5 ■ Assessment Form: How SMART Is This Advocacy Objective?	30 minutes
8. PLENARY DISCUSSION	15 minutes

The aim of this session is to ensure that participants are able to:

- illustrate the link between advocacy and research;
- recognize that advocacy makes demands on research;
- define the problem and recognize its importance for budget advocacy development;
- make the link between identifying the problem and developing the budget advocacy objective;
and
- identify which research questions to investigate to support budget advocacy.

5. **FACILITATOR INPUT: RESEARCH FOR ADVOCACY** **10 MINUTES**

- **Note:** This input is supported by the PPT file **MODULE 5 – Budget Advocacy Part I – Presentation #2** slides.
- The following key ingredients for successful budget work were noted from some case studies conducted by the IBP (Slide 3). Budget work that has impact requires:
 - Access to credible and timely information
 - An understanding of how to navigate the political terrain
 - An awareness of the socio-economic and political environment, and using opportunities that present themselves
 - Connecting local advocacy efforts with national-level processes and *vice versa*

- Strong coalitions to build support and legitimacy
- Persistent, dedicated, year-round work
- **The production of credible, timely, and accessible research**
- **Evidence-based advocacy**
- Let's focus on the last two factors.
- The notes for the **Slides 4-6** of the presentation are found in **READING 5.2: EVIDENCE-BASED BUDGET ADVOCACY**.
 - Slide 4: Budget Advocacy Work = Civil Society Advocacy Work + Budget Research/Analysis
 - Slide 5: What is Budget Research?
 - Slide 6: What Does It Mean to Do Evidence-Based Budget Advocacy?
 - Slide 7: Questions to Guide Budget Research (notes for this slide found in **READING 5.4: QUESTIONS TO GUIDE BUDGET RESEARCH**)
 - Slide 8: Final Points (no notes)
- Participants will find information on content of this presentation in their Workbooks in:
 - **READING 5.2 ■ EVIDENCE-BASED BUDGET ADVOCACY**
 - **READING 5.4 ■ QUESTIONS TO GUIDE BUDGET RESEARCH**

6. **TASK 5.2 ■ UNCOVER THE RESEARCH AGENDA** **30 MINUTES**

- Ask participants to study **READING 5.3 ■ RESEARCH FOR ADVOCACY: OBI 2010**, which provides the findings of the 2010 Open Budget Survey (from the final research report).
- When all the participants have read the material, invite them to (work in small groups) and use the OBI reading to extract answers to the questions in **TASK 5.2. ■ UNCOVER THE RESEARCH AGENDA**. They should also take into account the questions to guide budget research, as set out in **READING 5.4 ■ QUESTIONS TO GUIDE BUDGET RESEARCH**.
- After 20 minutes, ask the groups to reconvene and share their responses to **TASK 5.2**.
- Some points to keep in mind in facilitating this plenary discussion:
 - Ensure that participants are grasping the essential relationship between the advocacy objective and the research questions. The main learning outcome to be achieved at this point is to consolidate the idea that research questions should be grounded in an advocacy strategy. You will know that participants are acquiring this learning if they are assessing the

research questions in **READING 5.4 ■ QUESTIONS TO GUIDE BUDGET RESEARCH** in terms of how well these serve the advocacy objective, rather than, say, on overly technical or methodological grounds.

- Another important thing to look out for is whether participants are acquiring the ability to read budget advocacy information and then, in their own minds, back track to uncover what research questions the budget advocates must have posed right at the outset to arrive at these findings. Choosing research questions is a strategic issue. It is usually not feasible (or possible) to pursue every research thread and simply to see what comes up.
- This is part of understanding that there is no prescribed ‘right’ set of budget questions that must be addressed, blue print style, in every budget advocacy project. Instead, the ‘right’ research questions are the ones that will help you best to uncover what you need to know to improve the situation/solve the problem.
- Much can be said about the appearance or the style of the research report in **READING 5.3**, but this is not the main focus of this discussion. There is another (adjacent) conversation to be had about whether the researchers used language and images effectively to get their findings across. Participants may raise these issues, and it will then be important to flag this as an important theme. Assure participants that they will have several opportunities to investigate and learn more about the *presentation* of research findings later in the course.
- However, the main focus of this task is really whether the researchers asked the right research questions, and not how well they put their findings across.
- Draw the discussion to a close by encouraging participants to read as widely as they can in the terrain of budget advocacy – even on topics or sectors that fall outside the scope of their normal work. There are always important insights to be gained when you read such research reports (and other outputs like brochures or articles) from the perspective of someone trying to learn more about how to use research for advocacy. Ask yourself: What research questions would they have posed that allowed them to generate this kind of evidence?

7. PLENARY CHECK-IN: BACK TO SUNRISE STATE

10 MINUTES

- Remind participants about the **POLARUS CASE STUDY ■ ACCESS TO HEALTH CARE IN SUNRISE STATE**, which they started working on in the previous module. If necessary, ask participants to briefly read over the case study again and reconvene in their Polarus groups.

- Explain again that they will soon have to come up with a sound and compelling advocacy objective to bring about improvements to health care in Sunrise State. This objective will then form the basis for developing a powerful advocacy strategy over the next few days. As participants will see, a great deal of information gathering, research and analysis will go into this strategy development process. They will end up with an advocacy strategy that is informed by facts and figures about the health care situation in Polarus.
- Highlight the notion that a SMART advocacy objective requires some basic information and understanding of health care in Polarus. The participants were already introduced to some relevant information on the first day during the Right to Health session, as well as in Module 4.
- But now it is time to dig a little deeper. In their Polarus Sourcebooks, participants should have come across other information that could be used to inform an advocacy objective on health care. Invite participants to volunteer any suggestions in this regard, and to refer the group to the relevant parts of the Sourcebook.
- Make sure at this point that participants are aware of the following information in the Sourcebook:
 - Selected Development Data across the States in **Chapter 3 (page 21)**.
 - Development Profile of Sunrise State in **Chapter 3 (page 22)**.
 - All of the statistics relating to the health sector in **Chapter 3 (pages 29–33)**.
 - Excerpts from national health policy and national health strategy in **Chapter 4 (pages 34-37)**.
 - The outline of the various programs within state health departments in **Chapter 4 (page 44)**.
- Use **Slides 10 and 11** from the PPT file **MODULE 5 – Budget Advocacy Part I – Presentation #2** to brief participants on the process of developing a SMART advocacy objective on Access to Health Care in Sunrise State.
- **Slide 10:**
 - The problem is “Too many people in Sunrise State do not have access to adequate primary health care services.”
 - In order to formulate an objective that is specific enough, consider these questions:
 - How do Sunrise State’s Health indicators differ from states with better indicators?
 - How do access to PHC services and the number of doctors and nurses differ between Sunrise State and other states?
 - How is this changing?

- Why is this happening?
- **Slide 11:**
 - In order to formulate an objective that is measurable, consider this question:
 - Which and how many clinics, doctors, and drugs would need to be provided to address this problem?
 - In order to formulate an objective that is achievable, realistic and time-bound, consider these questions:
 - How many clinics has Sunrise State built in the past year?
 - Do other states have enough health staff? Can some be moved to Sunrise State, in particular to rural areas and peri-urban informal settlements? If more health staff need to be trained, how long will this take?
- Conclude by fielding any questions of clarification about Polarus, health care, and how to use the Polarus Sourcebook. Participants should be aware that they do not need to take the budget data contained in the Polarus Sourcebook into account yet at this stage.

8. **TASK 5.3 ■ IDENTIFYING OUR BUDGET PROBLEM AND RELATED BUDGET QUESTIONS** **15 MINUTES**

- Ask participant to work in their groups to identify the budget problem contributing to inadequate access to health care in Sunrise State.
- Participants should also discuss all the questions they would need to investigate in order to produce the evidence to support their advocacy objective.
- Refer participants to **TASK 5.3 ■ IDENTIFYING OUR BUDGET PROBLEM AND RELATED BUDGET QUESTIONS** to record their answers.

9. **FACILITATOR INPUT: ADDING THE BUDGET DIMENSION** **15 MINUTES**

- **Note:** This input is supported by **Slides 12 and 13** in the PPT file **MODULE 5 – Budget Advocacy Part I – Presentation #2**.
- The next step in learning about budget advocacy work is to begin looking at the development challenges we face through a budget lens.

- The group has now proposed a draft advocacy objective. Why is it necessary and how does it help to add a budget dimension to the process?
- The modules that follow will help us to add a budget dimension to our advocacy.

Notes on Slide 12

- In Module 6, participants will be exploring the politics, stages, and decision makers in the budget systems in Polarus. How will this knowledge help you to build an effective advocacy strategy?
- Firstly, this knowledge will help you to develop your advocacy objective even further than you have to date. It will allow you to understand what part of the budget may be contributing to the problem you want to address, as well as the solution you hope to bring about. With this understanding you can be more specific about the objective you want to achieve.
- The knowledge you gather in Module 6 will also allow you to build out other elements of your advocacy strategy. For example, you will have a better idea about who in government is responsible for the decisions affecting your objective. This is the person or persons you should target as the primary audience for your advocacy message.
- It will also allow you to identify possible enemies who might stand to lose if your advocacy objective is achieved.
- As you learn more about the politics and powerbrokers in the budget process, you will gain valuable insight into the triggers that make decision makers sit up and listen. This will help you to plan how you will frame your message later on, in order to get the reaction you want.
- Understanding the budget process allows you to be aware of the series of decisions and actions that goes into the planning, budgeting and delivery of any particular government service or program. This knowledge will help you to identify when in the budget cycle you should intervene in order to impact future decisions. In this way you can begin to plan a schedule of advocacy activities against a more certain timeline.

Notes on Slide 13

- In Module 7, participants will learn how to analyze government budgets. Again, what you learn in this Module will allow you to strengthen and develop your advocacy strategy even further.
- In the first place, analyzing the budget will help you to make your advocacy objective even SMARTer. It will give you the precise information and figures you need in order to propose a very specific solution to the problem you are trying to address.

- Analyzing the budget will also help you to illustrate why and how the solution you are proposing is achievable. For example, if you can show exactly how much funds are available in a certain program, and how they can be reallocated to serve the purpose you want, your objective is clearly achievable in practical terms.
- You could add certainty and detail to the time-bound aspect of your advocacy objective. Knowing where in the budget the problem lies, means you would also be able to pinpoint when changes in the budget would have to take place in order to bring about the solution you are advocating for.
- Analyzing the budget will help you to confirm the primary audience for your advocacy. Knowing what in the budget needs to change, you can make sure you target the right decision-maker(s) who can bring about the solution you are proposing.
- As you analyze the budget, you are also gathering vital information that you will ultimately use to develop your advocacy message and back up your arguments with facts and figures.
- Invite questions of clarification from the group. Make sure all the participants understand how the next two modules will build on the work they have done in Module 7.
- Important: Ask all the participants to write down the single consolidated advocacy objective they reached by way of consensus earlier in the session, and to have it ready for reference later in the workshop.

10. TASK 5.4 ■ A SMART ADVOCACY OBJECTIVE ON HEALTH CARE IN SUNRISE STATE **20 MINUTES**

- **The aim of this task** is to enable participants to develop better skills at formulating SMART advocacy objectives by practicing doing so.
- Refer participants to **TASK 5.4 ■ A SMART ADVOCACY OBJECTIVE ON HEALTH CARE IN SUNRISE STATE** in their Workbooks. Working in their Polarus CSO groups, ask the participants to formulate a SMART advocacy objective to guide their efforts to improve the health care situation in Sunrise State.
- Give the groups 20 minutes to complete their draft proposed advocacy objective. They should then write them up on a sheet of flipchart paper.

11. PEER GROUP FEEDBACK **30 MINUTES**

- All four of the Polarus CSO groups should be ready to proceed, with their SMART advocacy objective written on a sheet of flipchart paper. Ask each group to pair up with another group and present their advocacy objectives to each other.
- Draw participants' attention to **TASK 5.5 ■ ASSESSMENT FORM: HOW SMART IS THIS ADVOCACY OBJECTIVE?** in their Workbooks. This form provides some guiding questions to structure their discussions of one another's advocacy objectives. Ask the groups to take turns in giving feedback on how SMART.
- After 15 to 20 minutes, urge the groups to proceed to the next step in the exercise. Each set of two groups is to draft a single advocacy objective, drawing from the strengths of the two prior efforts. Their united advocacy objective should be written on a new sheet of flipchart paper. At the end, you will have two draft advocacy objectives (one from each pair of groups).

12. REPORT BACK

15 MINUTES

- Invite the groups to reconvene. Among the four groups, there should now be two proposed advocacy objectives. Ask the groups to display them.
- Place another flipchart with a blank sheet of paper where everyone can see it.
- Ask each pair of groups to report back on their draft objective. Make sure that it meets all the SMART criteria.
- The information in the Polarus Sourcebook and the case study should have alerted the participants to some disturbing trends and anomalies regarding health care in Sunrise State. Their advocacy objectives should reflect the following understandings:
 - Sunrise State is an urbanized state that is struggling with rapidly growing towns and cities. Clearly the government's program of providing primary health care through local clinics is not working as it should. There is a need to ensure such clinics are completed and functioning properly in informal urban settlements, on the outskirts of towns and cities, and in rural areas.
 - Sunrise State has a high ratio of doctors and nurses to the population it serves when compared to other states of Polarus. There appears to be a problem with organizing and managing these human resources. It could be that doctors and nurses are working mainly in secondary and tertiary hospitals, and not being spread to primary health clinics.

- In 2003, Sunrise State had 11,874 public hospital beds. By 2008, it had 12,021 – meaning in three years the state added less than 200 additional beds to its capacity to treat patients. There is also a question of whether these beds are located at primary health clinics, or at other levels of the health system.
- The Health Minister may see some advantage in taking the CSOs' findings seriously, so as to be seen to be improving the health system. It may be strategic to frame their message so that it has an “economic efficiency” hook.
- The strategic objective groups come up with at this point could be something like: *The Sunrise State government should ensure within three years that all rural and peri-urban primary health clinics in the state are fully staffed with well-trained, full-time doctors and nurses, and equipped with the medicines they need to provide primary health care.*
- Try to steer the discussion towards a strategic objective that more or less coincides with the one above. Explain that this is a provisional strategic objective. It will be revised and refined over the next few days as participants learn more about the **budget dimension** of advocacy.
- Provide a brief summary of both sessions to close Part I of the Budget Advocacy module.