

MODULE

1



INTRODUCTION TO MONITORING BUDGET IMPLEMENTATION

MODULE 1 ❖ INTRODUCTION TO MONITORING BUDGET IMPLEMENTATION

LEARNING OUTCOMES FOR THIS MODULE

By the end of this module, participants will have:

- remembered each others' names and gotten to know a little about one another;
- described the general ethos and participatory spirit of the training workshop;
- reviewed the basic outline of what to expect from the workshop;
- identified when and how to help evaluate and assess the workshop;
- prepared flipchart paper summaries of their organizations and budget work; and
- explained how other CSOs have monitored the budget implementation process.

STRUCTURE OF THE MODULE

Session 1: Introductions, Goals, and CSO Case Studies

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| 1. Welcome | 10 minutes |
| 2. Introductions | 20 minutes |
| 3. Overview & goals | 10 minutes |
| 4. Getting to know each other game | 15 minutes |
| 5. Gallery walk of case studies | 20 minutes |
| 6. Discussion of case studies | 15 minutes |
| 7. Your case study: Writing organizational profiles on flipchart paper | 15 minutes |

RESOURCES NEEDED FOR MODULE 1

- Flipchart paper and colored pens
- Name tags or stickers
- Participant's Workbook for each participant
- Copies of **Our Money, Our Responsibility: A Citizen's Guide to Monitoring Government Expenditures**, for all participants
- [Laminated display sheets: 10 Case Studies on Monitoring Budget Implementation](#)

- Several pads of Post-It notes or cards and adhesive
- Evaluation forms and logistics forms for all participants.

FACILITATION NOTES

Before the beginning of the module, make sure the laminated display posters are up against the walls around the training room, showing the case studies of budget monitoring work by civil society organizations in various countries.

SESSION 1: INTRODUCTIONS & GOALS OF WORKSHOP

1. WELCOME

10 MINUTES

- Welcome all the participants to the training workshop. Ask everyone to display their names on name tags for at least the first few days.
- Explain that the aim of this first session is purely to get to know one another better, and to introduce some important aspects of the course.
- If necessary, clarify any practical arrangements that may be worrying or distracting participants, so that everyone is relaxed and at ease.
- Distribute copies of the **EVALUATION FORM** and **LOGISTICS FORM** and briefly explain how the evaluation process will work. Participants are encouraged to use the Evaluation Form to assess the learning process throughout the workshop.
- Advise participants that they may be asked for informal feedback on a few occasions during the course. Evaluations will be collected in the final session.

2. INTRODUCTIONS: A SYMBOL OF YOU

20 MINUTES

- Ask the participants to each choose an object or symbol that represents who they are and/or the work that they do. Invite them to turn to a partner and to share their symbol with him or her, explaining what it means.
- After a few minutes, draw participants' attention back to the larger plenary gathering. Invite each participant to introduce his or her symbol to the group. If necessary to get the ball rolling, begin with yourself.
- Alternatively, as you go around the group, the instruction could be for participants to introduce their partners, not themselves, and to explain the meaning of their

partner's symbols. In the latter case, you might illustrate by introducing one of the other facilitators and vice versa.

3. OVERVIEW & GOALS OF THE COURSE 10 MINUTES

- Distribute copies of the Participants' Workbooks to everyone in the group. Explain that it contains important information and worksheets that participants will need during the course of the training.
- Ask participants to look at the **Goals of the Workshop on Monitoring Budget Implementation**, which are set out at the beginning of their Workbooks and for your reference, on the following page.

The goal of this workshop is to develop and strengthen the skills base, capacities and strategic visions of civil society groups who are committed to impacting on budget implementation, so that they are better equipped to:

- a) accurately diagnose the budget implementation problems underlying development problems;**
- b) select appropriate monitoring methods and tools to address these problems; and**
- c) apply the methods and tools to support their budget advocacy strategies.**

Discuss why it is so important to strengthen and develop your skills, capacities *and* strategic vision when you want to build the impact of your applied budget work.

- Briefly present the **Workshop Agenda**, which appears on the next two pages of the Participants' Workbooks. Field any questions of clarification.
- Explain that the workshop makes use of experiential learning activities, together with inputs

to present new information. The approach to training that will be used throughout the course emphasizes active and equal participation, open discussion and debate, mutual respect and learning by asking and doing.

4. GETTING TO KNOW YOU BETTER 15 MINUTES

Choose **one** of the following activities to give participants another chance to learn more

about each other. (Of course if you have more time available than the allocation above, feel free to include more activities as you see fit):

- **True or False?** Let people tell the group three personal things about themselves, one of which should be false. The group should guess which is false. You can do the same exercise with the facilitators – it helps bring them a little closer to the group.
- **The power of collective experience.** Ask participants to reflect on the number of years' experience they have with budget work/civil society work/advocacy work. Once each participant has a number in mind, arrange them in a row according to peoples' years of experience. Then add up the total experience of the group. Be sure to define 'experience' broadly enough to get to a high number of years, so that the exercise helps to build confidence.
- **Picturing your budget work.** Invite participants to think about their previous experiences of engaging in budget advocacy work. Provide them with sheets of paper and colored pens and ask them to illustrate/draw a picture to represent their organization and their budget work. Individuals from the same organization may work together. Then display all the pictures in a gallery walk – or invite participants to present their pictures to the whole group.
- **Experiences and expectations.** Draw a large tree on a sheet of flipchart paper, or prepare an even bigger tree on paper in advance. Ask participants to reflect on which modules or themes in the workshop outline they find interesting or are especially looking forward to. Hand out several pads of Post-It notes and ask them to write down – each idea on a separate note:
 - **What they bring with them:** What do they already know that is relevant to this training course, which they can share with others and contribute to the group? Paste these on the roots of the tree.
 - **What they hope to learn:** What do they really see as essential skills and knowledge they hope to sprout and grow during this course? Paste these on the trunk and branches of the tree.On the last day of the course, the group will revisit the tree and add the fruits of their learning. Paste these at the end of the branches.

5. GALLERY WALK OF CASE STUDIES

20 MINUTES

- Draw attention to the 10 laminated display posters illustrating the various case studies of organizations' budget monitoring work, that are displayed around the room.
- Explain that the case studies are drawn from the IBP Publication *Our Money, Our Responsibility*.
- Invite participants to circulate and read the information on the display posters.
- Encourage people to visit all 10 posters. If necessary, clarify that the aim for now is to gain a broad sense of the **scope** and **variety** of budget monitoring work. It is not necessary for participants to take account of every detail in the case studies.

6. DISCUSSION OF THE CASE STUDIES

15 MINUTES

- Ensure that every participant has a copy of the IBP publication, **Our Money, Our Responsibility: A Citizen's Guide to Monitoring Government Expenditures**. This publication includes additional 'best practice' case studies of methods used by CSOs around the world to monitor government budget implementation, and more detailed information about some of the case studies displayed in the room.
- Explain that the MBI training workshop is not structured to explore and discuss every methodology individually. There are a few good reasons for this. In the first instance, it would take too much time. Secondly, some of the methodologies are already being taught in dedicated training courses offered by the groups that first developed them.
- So instead of considering each CSO method in turn, this training workshop is designed to impart a generic set of skills that can be used and combined in different ways by different groups in order to monitor government budget implementation.
- However, it is still useful to be aware of the various methodologies that provide the inspiration and background to the workshop.
- Against this background, briefly introduce and discuss the methods used in the 10 case studies to monitor budget implementation (taking no more than 2-3 minutes for each case study).
- Questions to spark discussion...

7. YOUR CASE STUDY: WRITING ORGANIZATIONAL PROFILES ON FLIPCHART PAPER 15 MINUTES

- Ask participants to work with the colleague from their own organizations. (In most cases, organizations are encouraged to send two persons to attend the workshop, and not just one).
- Draw participants' attention to **TASK SHEET 1.1** in their Workbooks. Each group should record the following information on a sheet of flip chart paper:
 1. The name of the organization.
 2. Which level of government the organization focuses its work on (e.g. national, sub national, local government, etc.).
 3. What focus the organization has for its budget work (e.g. earthquake relief, children's rights, gender, health, etc.).
 4. How long the organization has been involved in budget work.
 5. How many people in the organization do budget work.
 6. How the organization conducts its work (e.g., public hearings, advocacy, research, capacity building, through a network of organizations, etc.).
 7. What impact the budget work has had (on policy, laws, civic participation, budget transparency, standard of living, etc.).
- The information above should be presented in short key points. Groups should also feel free to use symbols and illustrations to portray any of the information. There is no need to be limited to text.
- Explain that participants have the last 15 minutes to the session to begin working on their flipchart profiles, and should be sure to complete them by the end of the day.
- Ask the groups to display their organizational profiles on the walls of the conference room once they are ready. Each pair will be invited to present a brief overview of their organization and its work to the rest of the participants at some stage during the course of the workshop. The host facilitator will co-ordinate and notify participants of their time slot in advance.