



INTERNATIONAL BUDGET PARTNERSHIP  
Open Budgets. Transform Lives.

# Module 5: Budget Advocacy (Part I)





# *Conducting Research for Advocacy*



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# Successful Budget Advocacy Work

## 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





**Budget Advocacy Work =**

**Civil Society Advocacy Work**

**+**

**Budget Research/Analysis**



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# What Is Budget Research?

- Analysis of fiscal policy
- Analysis of proposed budget allocations and revenue sources
- Analysis of budget process in terms of participation
- Analysis of budget process in terms of transparency/ right to information
- Monitoring implementation of the revenue and expenditure side of the budget



# What Does It Mean to Do *Evidence-Based* Budget Advocacy?

- Using the budget as an instrument to address the problem you are trying to solve
- Using quality research to generate evidence that can be used to advance your advocacy objective



# Questions to Guide Budget Research

1. **WHAT** is the problem that you're trying to solve?
2. **WHAT** does this problem look like in the budget or budget process?
3. **HOW** can this problem be solved?
4. **HOW** would this solution change the budget, the budget process, or budget documentation?
5. **WHO** could make the changes that would fix this problem in the budget?
6. **WHO** could lose if this problem is fixed?



# Final Points

- Strong budget advocacy work begins with a SMART advocacy objective linked to clear budget research questions
- Research informs advocacy *and* advocacy makes demands of research
- Research needs to answer key questions to be useful for advocacy
- Research needs to be sound and legitimate to be taken seriously





# Break



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# Formulating a SMART Objective

**PROBLEM:** 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 primary health care services as well as the number of doctors and nurses differ between Sunrise State and other states?
  - How is this changing?
  - Why is this happening?



# Formulating a SMART Objective

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, 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? If more health staff need to be trained, how long will this take?

# Health Policy and the Budget Process (Module 6)

Understanding the budget process will help you to

- Develop your **advocacy objective** further
- Identify your **primary audience**
- Know your **enemies**
- **Frame your message**
- Think your **schedule** of actions



# Budget Analysis (Module 7)

Will help you to develop your **advocacy objective** further by:

- Enabling you to be more **specific**
- Helping ensure that your objective is **achievable** and **time-bound**
- Confirming your **primary audience**
- Helping develop your **message**

