Module 5: Budget Advocacy (Part I)
Conducting Research for Advocacy
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
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
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*