



Frances Avakit Adong leads a meeting of the Oseera Citizen's Parliament. Photo: Quim Vives / Oxfam America

BUDGET MONITORING AND ADVOCACY LEARNING REVIEW

Lessons from influencing efforts in multiple country contexts

In multiple countries around the globe, Oxfam and partners undertake budget monitoring and advocacy as part of their fiscal justice work, aiming to tackle inequality and reduce poverty through increased spending on public services (e.g. health, smallholder agriculture) in foreign aid budgets in donor countries and national budgets in developing countries. This learning review describes the approaches and tactics used for budget monitoring and advocacy by Oxfam and partners in a sample of eight countries/regions. It identifies key factors that contribute to or inhibit CSO efforts to influence budget policies and increase budget accountability.

BACKGROUND

Over the past 20 years there has been a global shift towards more transparent and inclusive budget processes¹. This is a result of several factors, including increased emphasis in the democracy and governance agenda of the 1990s on transparency, accountability and participation as fundamental elements of effective states and the rise in independent budget groups in developing and transitioning countries, including several non-governmental groups focused on increasing citizen participation in budget processes². However, in recent years several countries have shifted from democracy to more authoritarian-types of government and we are seeing trends toward increasingly shrinking civic space in several countries around the globe. In line with these trends, in the 2017 Open Budget Survey³, the International Budget Partnership (IBP) found that for the first time since 2006 the global transparency score has decreased, driven mainly by declines in progress in Sub-Saharan Africa, and that none of the 115 countries in the 2017 survey provide adequate opportunities for citizen participation in budget processes⁴.

In this context, civil society organizations (CSOs) have and continue to play an important role in contributing to efforts to increase transparency and accountability around public budget policies and processes, particularly ensuring that the voices of marginalized citizens are heard. Generally, non-governmental organizations (NGOs) engaged in advocacy around budget processes focus on achieving (1) greater budget accountability, including increased transparency and citizen engagement in the budget process, as well as raising awareness of the needs and interests of marginalized citizens; and (2) changes in budget policy, including improvements in budget systems, budget allocations and the results of investments for marginalized citizens⁵. While there are variations in the contexts and areas of focus, civil society groups' activities tend to combine budget analysis with advocacy activities and training, technical analysis of budget documents, expenditure tracking and budget monitoring, building advocacy networks, and organizing campaigns⁶. According to IBP a CSO cannot successfully influence budget policies or practices alone, and campaigns are most likely to be successful if they have high levels of cooperation with non-CSO and state actors and/or if there are high levels of cooperation between the CSOs and non-state actors in the campaign⁷.

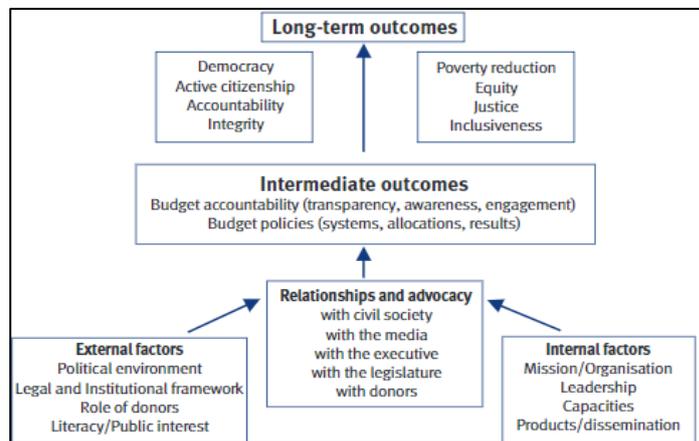


Figure 1. Civil society budget work: objectives and factors for success. Overseas Development Institute, March 2007¹

Based on studies conducted by IBP, the Institute of Development Studies (IDS), the Overseas Development Institute (ODI), and others, there is evidence that non-governmental initiatives have had success in positively influencing budget policies and increasing transparency and accountability. There are several key factors that are commonly cited as contributing to success in civil society budget efforts, including: 1) a strong and credible evidence-base, 2) citizen

engagement, 3) joint advocacy by a coalition with joint objectives, strong leadership and capacity, 4) effective timing of advocacy efforts, 5) support from decision makers, 6) investing in relationships with a wide range of stakeholders, and 7) long-term strategies and commitment, particularly if the aim is systemic or structural changes to budget systems and policies (see Figure 1).

PURPOSE OF THE REVIEW

In multiple countries around the globe, Oxfam and partners undertake budget monitoring and advocacy as part of their fiscal justice work, which aims to tackle inequality and reduce poverty through increased spending on public services (e.g. health, smallholder agriculture) in foreign aid budgets in donor countries and national budgets in developing countries. For Oxfam, fiscal justice is achieved through people exercising their rights voicing their interests and holding duty-bearers accountable⁸. The purpose of this learning review, which builds on the work of colleagues within and outside of Oxfam, is to answer the following questions:

- What approaches and tactics are Oxfam and partners using in their budget monitoring and advocacy work?
- What are the key lessons learned that may be useful for others who are or who plan to undertake this type of work? Specifically, what are the key factors that contribute to or inhibit CSO efforts?

The report focuses on a sample of eight countries/regions that are part of Global LEAP, a multi-issue advocacy initiative that encompasses much of Oxfam's work on aid and development finance, South-South Cooperation and smallholder agriculture in Africa: The Netherlands, Ethiopia, Tanzania, Brazil, Ghana, Burkina Faso, Nigeria, and the European Union (EU).

METHODOLOGY

The report is accompanied by three country case studies which provide in-depth information on the approaches and lessons learned in Brazil, Ghana, and Tanzania. The findings in this report and the case studies are based on (1) semi-structured interviews with 20 people made up of 13 Oxfam staff, including the leads on the budget monitoring work in each country/region, and seven partners, and (2) a document review of external and internal resources directly relevant to the project and internal quarterly and annual reports of the teams from 2015-2017. Interview transcripts were analyzed using the qualitative analysis software Dedoose to identify themes. It is important to note that this is not an evaluation of the influencing work of the teams who are part of the review; rather, this is a learning review based primarily on teams' self-reporting and reflection.

STRATEGIC OBJECTIVES & OUTCOMES

In alignment with the literature, the strategic objectives of teams included in the learning review fall into two categories:

- Budget Policies: The primary, long-term objective of the majority of teams

included in this review is to influence budget policy, specifically the allocation and quality of budget policies, as well as ensuring implementation of existing policies.

- **Budget Accountability:** Several teams also have explicit objectives related to increasing transparency of the budget, raising awareness on key topics related to the policies they are trying to influence, and increasing space for citizen engagement in the budget process.

Table 1. Strategic Objectives of the Case Study Countries

Country	Strategic Objectives
<i>Ghana</i>	<ul style="list-style-type: none"> • The Government of Ghana puts in place better and improved agricultural development policies and programmes that benefit women and other small-scale producers. • Oxfam increases civic space for women and men small-scale producers, civil society organizations and other citizens to collaborate with each other and to interact with and influence duty bearers. • Oxfam increases capacity of actors and stakeholders to evaluate and proactively influence the quality and equity of agricultural budget of government and donors.
<i>Tanzania</i>	<ul style="list-style-type: none"> • The government of Tanzania increases the percentage of the national budget that is allocated for agriculture and improves policies and programs to better benefit women and other small-scale farmers. • Oxfam increases understanding and opportunities for involvement in national budget processes by citizens and local communities in Tanzania.
<i>Brazil</i>	<ul style="list-style-type: none"> • With CSO allies, build and implement a methodology to monitor the Brazilian public budget for South-South Cooperation (SSC). • The federal government in Brazil adopts mechanisms of participation, transparency and accountability on South-South Cooperation (SSC). Specifically, two key government agencies in charge of official Brazilian SSC reporting adopt the methodology developed by Oxfam and allies.

Based on the case studies that were part of this review, Oxfam and allies have contributed to increased budget accountability in a number of ways, particularly through building knowledge and awareness on key issues related to the budget and increasing the capacity and space for civil society to engage in budget processes. In Ghana, the coalition has contributed to the Government of Ghana’s increased recognition of civil society and willingness to create more space for civil society to raise their voice and provide input in budget processes, increased awareness and capacity of smallholder farmers and other civil society actors to engage in budget processes, and increased spaces for affected citizens to set the agenda themselves. In Tanzania, Oxfam and partners have helped to build the capacity of smallholder farmers and other citizens to engage in the budget process and have created spaces for them to engage directly with policymakers to advocate for their asks. While the work in Brazil is still in the early stages, they have contributed to efforts to increase transparency around South-South Cooperation (SSC) and have created opportunities for civil society organizations to engage in the budget process.

In addition, there is some evidence that Oxfam and allies have also had some impact on budget policy in terms of influencing the debates and securing commitments from policymakers and in some cases influencing policy change. For example, in the Netherlands, advocacy efforts by Oxfam contributed to the decision and announcement by the new Dutch coalition agreement in 2017 that

they will invest an additional 1.7 billion euros in Official Development Assistance (ODA) over the next four years, marking a step change following seven consecutive years of aid cuts.

APPROACHES & TACTICS

This section highlights the approaches and tactics used most often by the teams who are part of the review. While there is variation in the objectives of teams and the political and economic contexts they work in, there was considerable overlap in the types of approaches and tactics they used. When asked what has worked well, teams most frequently mentioned the use of the following three tactics as being particularly effective: research and analysis, direct engagement with government officials and joint work with allies and partner organizations.

Research and Analysis: For all of the teams in this review, research and budget analysis is an important tactic for developing policy asks and as a tool for their advocacy. It is used mainly: (1) to provide a detailed analysis of the existing or proposed budget amounts and policies in specific areas (e.g. foreign aid, agriculture) to understand where the funds will be spent and how; (2) to monitor budget expenditures, both the quantity and how the budget was actually spent; and (3) to better understand the needs of the target audience the budget seeks to benefit (e.g. smallholder farmers).

Direct Engagement with Governments: The majority of countries engage in direct advocacy with target government officials and decision makers in key ministries, parliament, political parties, budget offices, and in some cases work closely together on specific pieces of work. Engagement typically takes the form of meetings with target officials or technical staff, government hearings or consultations, attendance of officials at public events, policy letters and briefs and the use of social media to engage directly with policymakers. In some cases, the NGOs have been invited into consultations with government offices and/or have developed relationships that enable ongoing engagement with staff in key offices and ministries who develop and monitor policies and budgets.

Joint work with allies and partner organizations: Each of the teams works in some form of alliance or partnership with other organizations or groups, oftentimes with other NGOs, both international and national, who have similar or overlapping objectives. Some have also partnered with other types of groups, such as farmer associations, think tanks, and academics.

Citizen Engagement: Citizen engagement in Northern donor markets generally takes the form of actions through digital means, such as social media and signing online petitions. In the African countries, teams created spaces such as events, workshops, and trainings, to help citizens in communities and key groups (e.g. farmer associations) better understand the budget and policies, to discuss and develop their key asks for government, and to bring together different stakeholders so citizens could voice their interests directly with decision-makers.

Use of political moments: In addition to engaging in advocacy around political moments focused specifically on the budget process, such as the release of the draft budget, some teams have also used elections and other political moments as an opportunity to have influence on budgets.

Training and Capacity Building: Each of the teams in the review provided some form of training, in many cases a formal training or workshop, to help other CSOs or other key stakeholders understand the budget and how to conduct budget analysis and tracking on their own. In Tanzania, Burkina Faso, Ghana and Nigeria, farmers were also included in the trainings, and in Ghana and Burkina Faso they also include the media. Some countries have also provided training for government officials.

Traditional Media: In order to raise awareness regarding key issues related to the budget and in some cases to increase pressure on government, teams aim to increase media coverage through press coverage and op-eds. Oftentimes the focus is around public moments or critical points in the budget cycle in order to attract media attention. In some countries, teams are engaging directly with journalists to build their awareness and capacity to conduct their own analysis of budgets and relevant policies.

Development and Implementation of Monitoring Tools: Some teams have developed and/or implemented tools to monitor the implementation of the budget. In African countries, the monitoring is typically led by local or national organizations and engages citizens in relevant communities in the actual monitoring (e.g. farmers to track agriculture projects) and investigative journalism to assess the implementation/impact of the budget. In Brazil, Oxfam and Articulação SUL (ASUL) produced a methodology and guide for CSOs to track key budget themes and are creating an open database to enable CSOs and researchers to more easily conduct their own analysis.

LESSONS LEARNED: CONTRIBUTING FACTORS & CHALLENGES

This section summarizes eight themes that emerged from the review in terms of lessons learned. In each theme, the key factors and challenges that enable or inhibit effective influencing in budget monitoring and advocacy efforts are outlined. While the lessons are generally consistent with the contributing factors and challenges often cited generally for advocacy efforts, this section does draw out some lessons specific to budget monitoring and advocacy. The majority of the themes align with and support the findings of previous studies conducted by Oxfam, IBP, IDS, and others.

Strong Evidence-Base

Taking an evidence-based approach to advocacy – using research and data to demonstrate how government budgets are being implemented or to identify gaps in these budget allocations – is an effective way to influence decision makers, raise awareness on key issues, and engage key citizen groups. While the use and need for this analysis exists in all of the countries included in the review, the approach taken, level of effort required and the frequency of the analysis varies depending on the availability of information and resources to conduct research and analysis.

In countries where data is available, Oxfam and partners have found it effective to use existing data that is considered to be credible by government targets and

to provide the analysis in formats that are easy to interpret and understand. For example, the coalition in Ghana intentionally uses evidence and documentation provided by government sources where possible, and data provided by local organizations working in communities, to ensure the Government of Ghana trusts the analysis. And in the Netherlands, the team has found it effective in communicating the issues and influencing policymakers to visualize their analysis of Dutch foreign aid data in simple graphs, films, and figures to make it easier to understand. Even in these contexts, there can be issues related to the quality of data provided by government agencies and/or a need to supplement public reports with more frequent, real-time analysis for advocacy efforts.

In countries or areas where relevant data is not readily available, Oxfam and partners must invest more effort and time in developing methodologies and approaches for collecting this data. As mentioned above, Oxfam and ASUL have developed a methodology and database to track particular budget themes of South-South Cooperation in Brazil. And in Tanzania, a group of local women leaders/farmers were trained to conduct interviews with community members to understand the extent to which they are benefiting

from the implementation of certain budget policies and to what extent their needs are being met; these results were then shared with the government.

Furthermore, in several countries the lack of gender disaggregated data and relevant statistics were cited as a challenge to being able to properly understand and address issues related to gender justice and women's rights in the budget. As a result of this challenge, several of the teams in the review have or have plans to (1) invest in capacity building on

gender sensitive budgeting and monitoring, and (2) increase their engagement with existing women's rights organizations and women's groups.

“Due to the lack of gender statistics and gender disaggregated baselines in agriculture, it has always been difficult to translate gender sensitive budgeting into policies...there is a need to share with and learn from others' specific expertise in gender sensitive budget advocacy and analysis, as well as in budget tracking and accountability.”

Oxfam in Ghana staff

Joint Advocacy with Partners & Allies

Collaboration with partners and allies is most effective in raising the profile of key issues and influencing decision makers when organizations are aligned in their goals, use common messaging and asks, prepare joint social media actions and press reactions, and build on the strengths of each organization. For example, at the EU level Oxfam works as part of a CSO group in which each group has a different area of expertise and different government contacts, so they are able to reach a wider range of key officials than if they worked separately. Teams interviewed noted they have been intentional about working with partners and allies that have different areas of expertise and connecting them to a wide range of resources and target stakeholders, including working with organizations with technical expertise in budget monitoring and analysis and/or those with strong ties to local communities. In Burkina Faso, collaboration with civil society has resulted in the establishment of regional agricultural policy monitoring committees made up of actors from farmers' organizations, women's organizations and representatives of NGOs in three regions of the country. These committees directly challenge the regional authorities involved in the implementation of agricultural policies and participate in agricultural policy forums to ensure that the concerns of women and small producers are taken into account.

Coalitions or groups are generally more effective and efficient when they agree on an overall policy framework and priorities for joint collaboration, they pool resources for research and capacity strengthening, and they join in media exposure efforts. This is challenging, particularly when organizations have different policy priorities and some members of the coalition/partnership have more (or less) resources (staff and financial) to contribute to joint efforts.

While the appropriate role(s) for Oxfam in coalitions and partnerships varies by situation and context, broadly speaking Oxfam can best contribute through (1) contributing to strong joint strategies and analysis; (2) taking a more proactive role to fostering collaborative action between partners by playing a coordinating role; (3) providing financial and technical support to partners or the coalition efforts as a whole; (4) conducting or providing resources for research and analysis; (5) creating spaces for different stakeholders to come together,⁹ and (6) bringing in a gender perspective to the research and advocacy efforts whenever and as much as possible.

Timing & Political Opportunity

The teams in the review noted the importance of having an in-depth understanding of the budget cycles and processes in each context in order to identify political opportunities for influencing. This includes an in-depth understanding of when and how particular decisions will be made throughout the process, who the key decision makers are and who influences them, as well as when there are opportunities to influence the process. Oftentimes, there are specific windows of opportunity during the cycle for influencing decision makers and ensuring proper implementation of policies that teams need to understand and plan for in advance.

Once the budget process, targets, and moments for influence are understood, the joint plans of the team should identify which strategies and tactics will be implemented at which moments in the cycle based on what will be most effective in influencing target decision makers during those moments. In the Netherlands, Oxfam uses more public-facing tactics, including traditional and social media, during the moments where there is increased public attention to the budget. During other moments in the cycle that are less public, they prioritize analysis and direct advocacy.

In addition to moments in the budget cycle, multiple countries have used other public moments as opportunities for advocacy or campaigning around the budget. In Nigeria, the team has organized around existing festivities for Christmas, Eid and key moments such as International Women's Day and World Food Day and made use of influential individuals such as musicians to mobilize citizens. In Burkina Faso the team organized advocacy actions around the development of the country's National Agricultural Investment Program. Multiple countries, including the Netherlands, Ghana, Burkina Faso, and Tanzania have also used national and/or local elections as a key influencing moment for raising awareness on the issues and influencing political parties or candidates to make commitments on the given budget and policy asks. These efforts appear to be most effective when there is a significant public engagement element, such as media, social media, online actions, and/or public events. For example, in the Netherlands, Oxfam and ONE not only influenced eight political parties to pledge to reverse the trend of decreasing ODA if elected through signing a manifesto,

Oxfam also publicized this manifesto through the Oxfam website, Facebook, Twitter, and YouTube. In Burkina Faso and Ghana, teams engaged the media and created spaces for smallholder farmers and other members of communities to voice their concerns and asks directly with political candidates at public events, and in Nigeria, Farmers' Manifestos were developed to engage political parties and candidates seeking elective positions.

On the other hand, some political shifts can pose challenges to the team's efforts to influence the budget, such as changes in political parties to less supportive Ministers or Members of Parliament, or changes in the broader political environment. For example, the budget work being done in Brazil has taken much longer than expected due to the recent political changes which have led government officials to focus on other issues, staff turnover, and decreased space for social dialogue with the government. In addition, the large increase in the number of refugees coming into Europe over the past few years has caused Oxfam and allies to take a more defensive approach as additional ODA funds were used for in-donor refugee costs rather than going to developing countries, and government and public sentiment in many countries has shifted to a more national focus.

Direct Engagement with Government

In addition to understanding the key decision points in the budget cycle, it is important to have a strong stakeholder mapping of who makes particular decisions and who or what influences them. Several teams noted that it is effective to have key champions or allies within the government who support the issue and are willing to push for support at the policy level, and that it is oftentimes very useful to engage directly with government staff or civil servants working on the technical aspects of the budget or a particular topical area, since they are an important source of information and potential allies, and they usually are in their roles longer than the higher-level officials or Members of Parliament. In countries where governments are open to hearing the concerns of and feedback from NGOs, CSOs, and citizens, engaging citizens to put pressure on decision makers can increase access to decision makers and opportunities for influencing them.

In some cases, Oxfam and partners are both advocating for government stakeholders to champion key issues as well as actively working together with government stakeholders to identify solutions for key issues. Oxfam and partners can play a key role in garnering additional political support by building an evidence base, educating other government stakeholders, and engaging citizens to put pressure on decision makers. For instance, the Ministry of Agriculture in Tanzania approached Oxfam to explore a partnership to strengthen the capacity of Members of Parliament in budget monitoring. While it is more complex in contexts with limited space for civic engagement, such as Ethiopia, Oxfam and partners have embarked on joint projects and initiatives with government offices where there are shared interests and benefits on each side. For example, Oxfam has partnered with the Ministry of Agriculture and Natural Resources on the Female Food Hero Awards, a national effort to raise awareness and acknowledge the important role of women farmers in their communities and in the country.

A number of teams highlighted the importance of taking a constructive approach

with government stakeholders and creating a dialogue between civil society and government – approaching them as a collaborator or an ally rather than being confrontational. This approach, along with having very clear messaging, is effective in engaging with governments and key to influencing budget advocacy processes.

Citizen Engagement

Ensuring citizens are part of budget advocacy activities and processes raises the voices and concerns of citizens to influence policymakers and promotes increased accountability of governments. To achieve this, interviewees cited the importance of ensuring that citizens first understand what is in the budget, how it is being used, and why the topic they are advocating for matters. Effective strategies look differently depending on the context. In Europe, the focus is often on educating target citizens, oftentimes Oxfam supporters, on the ODA budget and demonstrating why it is important to their lives, and then asking them to take some sort of online action (e.g. sharing on social media or signing a petition or letter that will be sent to the policymaker). In the African countries that were part of the review, this often takes the form of in-person trainings and workshops with CSOs and citizens in target groups (e.g. farmers) on how to understand and analyze the budget, as well as dialogues to discuss issues from the perspective of citizens and spaces for citizens to voice their concerns directly with policymakers.

For teams working in Burkina Faso, Ghana, Ethiopia, Nigeria, and Tanzania, citizen engagement is not only an avenue to influence budget policies, it is an objective in itself. Oxfam and partners have found it effective to create space for dialogue among citizens on how these budgets are being implemented, and then create opportunities for civil society to communicate directly with policymakers and with the media. For example, in Burkina Faso, the team convened women leaders for a dialogue and the creation of a rural women's manifesto that included policy asks related to core issues facing women farmers, and then organized spaces for these women leaders to communicate their asks directly with the government through private meetings, public events, and media.

Teams noted the importance of investing in the advocacy capacity of citizens in developing countries, not only because they are powerful agents in the advocacy processes Oxfam and partners are organizing around, but also to build the capacity of a broader range of actors to act and have influence on issues when other opportunities arise. The capacity strengthening trainings provide citizens and local organizations with increased knowledge, which often is accompanied by increased confidence in how budget issues affect their lives and that of their communities and in ways to take action. Interviewees working in developing countries who are part of the review cited multiple examples of women farmers and other farmer groups that have been trained by Oxfam and partners who have afterwards independently advocated for better budget investments and improvement in agricultural policies to support small holder farmers in their communities.

Teams noted the importance and challenge of monitoring and holding policymakers accountable to commitments made and creating ongoing opportunities to engage citizens and groups who have received capacity building trainings. Some teams, such as Nigeria and the Netherlands, have or are in the

process of developing online platforms to track and assess the efforts of political parties' and/or the government's efforts to implement key commitments, in part to address this challenge.

Strong Personal Relationships

Whether talking about internal Oxfam teams, partnerships with allies, or engagement with government stakeholders, the importance of trust and personal relationships was mentioned by most interviewees. Many cited the importance of cultivating and nurturing internal and external relationships as core elements that were critical to the success of the work. Strong personal relationships among teams makes goal setting and role allocation easier, colleagues better understand one another's strengths, and this promotes a culture of openness to creative ways of working. Good working relationships are also important with allies and partners, as well as the relationships they have with other key players, because they enable different actors to align interests, messages, and policy asks during engagement with policymakers.

While they take time and effort to develop, direct personal relationships with decision makers and government staff can be critical for getting information and having influence on key issues. In Ethiopia and Brazil, interviewees highlighted the important role of relationships teams have had with policymakers, ministries, and the general public. However, some interviewees cited challenges in sustaining relationships established with policymakers while working with limited resources, and even more importantly when there is staff attrition within Oxfam, since these relationships are often personal in nature, and suggested that an institutional system to ensure continuous relations is needed.

Role of Traditional & Social Media

Media can play a critical role in disseminating and amplifying key messages and information regarding the budget process and policy. Traditional and social media sources have been used to educate the public about budget processes and how they affect people's lives and why better budget policies can help decrease poverty. Radio, TV, newspapers, and films have been used to disseminate messages for different target audiences. To enable this, teams have built trust, maintained relationships with journalists, and strengthened journalist's skills through media capacity strengthening trainings to improve their understanding of budget processes and its impact on people's lives, and have raised their awareness on issues by connecting them directly with citizens and issues at the village and district levels. For example, Oxfam and partners in Burkina Faso notified journalists that the government was not fulfilling its promise to purchase locally grown rice from women farmers and brought five journalists to the communities to meet and discuss the issue with the women. This resulted in the publication of stories on the issue and soon after government officials came to buy the rice. In the EU office, journalists now reach out directly to Oxfam for interviews or op-eds, because they trust Oxfam and partners' opinion and analysis of the budget political process. In Nigeria, Oxfam was able to partner with the Government to provide collateral and interest free credit to over 4000 farmers in 3 states as a result of a media report on the Village Savings and Loans Associations' (VSLA) model implemented by Oxfam.

Some teams also emphasized the important role social media can and increasingly does play in amplifying messages to target groups (particularly youth), engaging citizens who would not normally engage in the budget process, and mobilizing them to take action, as well as in engaging and dialoguing with policymakers. To use social media effectively, a digital lead interviewed advised that teams should use content that is appropriate to the audience and the social platform being used, such as shareable content in the form of videos, graphics, drawings, and pictures, rather than posting complex research results and full reports. For example, in the Netherlands, the team uses social media to engage supporters around public moments in the budget cycle with infographics with short captions (drawing from the analysis), quizzes for supporters to respond to, and creative short films that tell the story of the aid budget.

Sharing Experience & Learning

Multiple teams cited the critical role learning and sharing has played in helping them develop effective strategies and tactics; this includes promoting a culture of reflection within the team or coalition in terms of identifying lessons learned from their own work, as well as sharing experiences and lessons with other groups who do similar work in other countries or sectors. Many interviewees noted the need for exchanges across teams, through webinars, meetings, and learning platforms, to learn from other countries' experiences, approaches, and lessons.

It is important to register the different lessons learned during the process of learning about the public budget... [including the] challenges of how to work with the public budget and how to analyze the data...it is important to share knowledge with other members of the team.'

Interviewee in Brazil

CONCLUSION

The findings support the work of colleagues at IBP, IDS, and others who have identified a number of factors that contribute to and/or inhibit non-governmental efforts to influence budget policies, increase transparency, and increase citizens' ability to hold governments accountable. The review highlights three tactics that have been particularly effective for Oxfam and allies. The first is the focus on developing a strong evidence base built from budget research and analysis, which is then used to raise awareness, increase capacity for engagement in the budget process, and advocate for priority issues. The second is the effectiveness (and as IBP argues, the need) for CSOs to work together with other non-governmental actors to achieve change. According to teams who participated in the review, joint influencing efforts are generally most effective when organizations are aligned in their goals, use common messaging and asks, pool resources for research and capacity strengthening where possible, prepare joint social media and traditional media efforts, and build on the strengths of each organization. The third is direct engagement with government officials, which takes a number of forms and is particularly effective when partnerships and personal relationships are developed in which non-state actors and government officials collaborate on particular aspects of budget monitoring (e.g. building support for particular policy changes and building capacity for budget analysis among government officials). While the purpose of the review is focused on the learning, the review does suggest that Oxfam and allies in key countries in the review have had some success in increasing awareness through research-based

advocacy, increasing capacity of civil society, media and sometimes government officials to analyze and monitor budgets and creating additional space for meaningful engagement of citizens in budget processes. In addition, there is some evidence that Oxfam and/or core allies have influenced budget policy. The case studies that accompany this report provide more in-depth information regarding the budget monitoring successes and lessons of Oxfam and allies in three countries: Brazil, Ghana, and Tanzania.

APPENDIX: INTERVIEWEES

Location	Name/Organization
<i>Brazil</i>	Fernanda Papa, Oxfam Brasil Laura Trajber-Waisbach, Articulação SUL Daniel Martins, Articulação SUL Melissa Pomeroy, Articulação SUL Luara Lopes, Articulação SUL
<i>Burkina Faso</i>	Ousmane Diallo, Oxfam in Burkina Faso Issaka Ouandaogo, Oxfam in Burkina Faso
<i>Ghana</i>	Anwar Sadat Adam, Oxfam in Ghana Richard Hato-Kuevor, Oxfam in Ghana Abdulkarim Mohammed, Oxfam in Ghana
<i>Ethiopia</i>	Seble Teweldbirhan, Oxfam in Ethiopia
<i>European Union / Brussels</i>	Alessandra Croppi, Oxfam International
<i>The Netherlands</i>	Daniela Rosche, Oxfam Novib Jacco Vlastuin, Oxfam Novib Wouter van Dis, Oxfam Novib Rinze Broekema, ONE
<i>Nigeria</i>	Abdulazeez Musa, Oxfam in Nigeria
<i>Tanzania</i>	Eluka Kibona, Oxfam in Tanzania Stephano Mpangala, Rural Urban Development Initiative (RUDI) Eva Daudi, Rural Women's Farmers Forum

NOTES

- ¹ International Budget Partnership. Role of civil society budget work. <https://www.internationalbudget.org/why-budget-work/role-of-civil-society-budget-work/>. Accessed 26 January 2018
- ² Robinson, Mark (September 2006). Budget Analysis and Policy Advocacy: The Role of Non-governmental Public Action. Institute of Development Studies
- ³ International Budget Partnership. Open Budget Survey 2017. <https://www.internationalbudget.org/open-budget-survey/>. Accessed 31 January 2018.
- ⁴ The 2017 Open Budget Survey measures participation in terms of governments providing information in advance, comprehensive engagement between government and citizens, availing feedback to citizens on their contributions, as well as efforts to be inclusive and incorporate vulnerable groups. The focus is on formal opportunities to participate.
- ⁵ Robinson, Mark (September 2006). Budget Analysis and Policy Advocacy: The Role of Non-governmental Public Action. Institute of Development Studies
- ⁶ ODI Briefing Paper 16 (March 2007). Budget Monitoring and policy influence: Lessons from civil society budget analysis and advocacy initiatives. Note: Based on study by International Budget Partnership (IBP) and Institute of Development Studies (IDS)
- ⁷ Larsen, Jillian (May 2016). You Cannot Go it Alone: Learning from Cooperative Relationships in Civil Society Budget Campaigns. International Budget Partnership.
- ⁸ Oxfam (2016). Fiscal Justice Global Track Record. <http://policy-practice.oxfam.org.uk/publications/fiscal-justice-global-track-record-oxfams-tax-budget-and-social-accountability-620087>
- ⁹ Suggestions 1-5 were provided by Pol de Greve and Maxwell Agbenorhevi (2017), Agricultural Budget Monitoring and Advocacy: The case of Ghana and supported through other sources in this review.

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