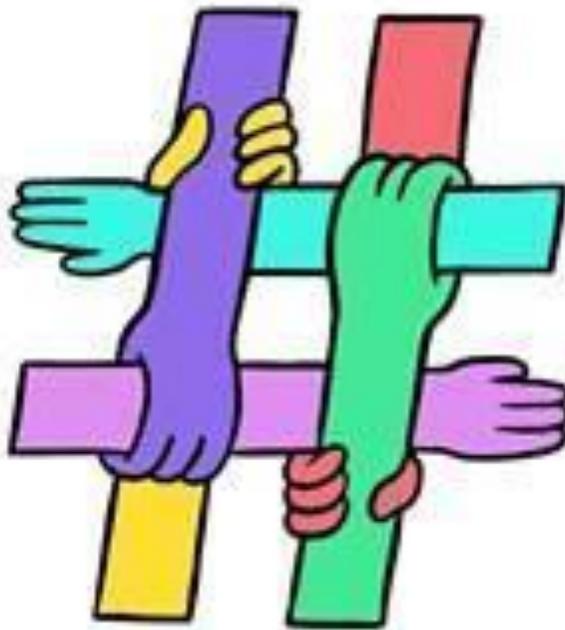




# **Weaving Our Way Forward: Actioning IBP's Strategy**



**Annual Staff Retreat**

December 5-7, 2018



## A note from Warren

I am super-excited to have everyone together here in DC for our staff retreat! So much has happened since we last met in June 2017. Most exciting is that we have 23 new colleagues. Welcome – AbdulKarim, Abraham, Adalei, Anand, Ariel, Austin, Caitlyn, Carol, Catherine, Chloe, David J, Debby, Gloria, Guillermo, Indira, John Ngoka, Jostne, Kipkorir, Michael Petty, Michael Parks, Olivia, Sally, and Tonika!

Retreats have a strong tradition in IBP as essential spaces where we can:

**Energize** each other and the organization, so that we can all recommit with excitement to IBP and the work ahead.

**Stimulate** and re-stimulate personal connections in the organization by virtue of having all our colleagues around us.

**Learn** and develop a shared understanding of all that we do, think together and lift out lessons that redefine and improve the work.

**Strategize** and develop policy at program, operational and organizational level

Retreats are critical to building one organization with shared values, vision, and connection. The biggest development for us as an organization since we were last together is that we have a new strategic plan. This plan emerged from a thoughtful and participative process that looked hard - internally and externally – at the external context, our previous work and impact, and our vision for the next five years. The most important part of the plan is the first two pages where we set out our shared vision, values, goals, and outcomes. The initiatives are pretty exciting too (!) but gain added value when connected across the organization.

Having worked so hard on the plan, it is important now that we all really understand and own it – both individually and collectively as an organization – and that we can all articulate it in a compelling way. So that is what lies at the heart of this retreat.

By the end of our three days together, I hope that we will all leave:

- Feeling reenergized and committed to being in IBP
- Understanding our vision as an organization and how we will look different in five years.
- Knowing what everyone is doing and being able to talk to that at a strategic level
- Feeling inspired, challenged, and excited to contribute.

But I also want us to have fun and to really get to know each other.

The design team has put enormous effort into planning an engaging retreat to achieve these goals. We thank them for their work. The responsibility for ensuring the success of the retreat now passes to all of us.

## Warren



## The People

**IBP staff** from DC and around the world - Canada, Ghana, India, Kenya, Nigeria, Brazil, South Africa, and the United Kingdom - are at this retreat. We are a diverse group representing many nationalities, ages, seniority and years at IBP, genders, teams, interests, expertise, cultures, ethnicities, and abilities. And, we are deeply grateful for this diversity.

Included at the back of your retreat booklet that you will receive on the first day is a staff directory, complete with pictures and fun facts about all 62 of us! Take time to read it through and learn about your colleagues. *Who do you know? Who do you want to know?* We hope you use this retreat to connect and reconnect in meaningful ways!

**The Lead Team** for this event is: Aideen Gilmore, Virginia McMullan and Carrie Ahrens. This group will help maximize our time together.

**The Planning Team** for this event is: Aideen Gilmore, Anjali Garg, Brendan Halloran, Carrie Ahrens, David Robins, Jennifer Grant, Trisha Viecco and Virginia McMullan. Jeanette Romkema of Global Learning Partners was also contracted to assist in the planning and design. All worked hard to ensure that this will be a meaningful learning event for all in attendance!

**The Lead Overseer and Information Giver** during the event is Carrie Ahrens. She is here to make sure all of the sessions run smoothly and to assist in any way needed. Bring your questions, ideas, concerns and praise to her - she is here to help!

**The Food & Venue Coordinator** is Trisha Viecco. She is here to ensure your food & venue concerns and needs are attended to.

**The Hug Giver** is Alex Ciconello. He would like nothing better than to give you a hug, when needed and asked. This was a request on the pre-event survey and he is happy to oblige!

## The Purpose

IBP works hard to bring its entire staff from around the globe together at least once a year. These retreats serve a number of purposes:

- team building and connecting with colleagues
- energizing
- knowledge sharing and learning
- strategizing and planning

Recently, IBP has rolled out a new strategic plan, with an updated vision and mission. The retreat is seen as a perfect place and time to look closely at this new plan, IBP's values, and how they will lead our work, individually and collectively.



There are also many new staff at IBP and there is a need to get to know each other and learn how we can best work together.

In general, we all need face-to-face time with each other. Most of us often only meet virtually and being in the same room to chat, plan, discuss, share and learn is of great value to us.

Within this overall purpose, and as with most retreats, there are two distinct aspects. There is the desire to engage with new learning and develop common understanding of critical concepts. There is also the need to use the opportunity of this gathering to work collectively and accomplish certain tasks as an organization.

### **The Desired Outcomes**

**As a result of this retreat**, our hope is that each individual:

- feels more ownership of, and clarity about, the strategic plan
- feels more confident about our individual and collective roles in the strategic plan
- feels a renewed excitement about working for IBP and for doing the work we do
- is a stronger advocate and champion for our work and for our partners
- is better able to reach out to other teams and feels the value in doing this

### **The Achievement-Based Objectives**

**By the end of this retreat**, you will have done the following to ensure the success of our outcomes (named above):

- met and learned about your colleagues
- heard stories that reflect IBPs history, diversity and learning over the years
- connected with our vision, mission and values
- identified what the strategic plan means for IBP and your role within it
- deepened your understanding of the five initiatives in the strategic plan and how they weave together
- connected with the importance of learning as a core value in IBP
- unpacked what needs to be in place to ensure everyone contributes to and benefits from learning in IBP
- explored a new way of talking about IBP and identified your role as storyteller in the organization
- committed individually and collectively to making IBP's work a success going forward



## The Time and Timing

The 2018 retreat is Wednesday to Friday, December 5-7, 2018. The last retreat was in June 2017. Much has happened for you and for IBP since then!

The **scheduled times** for day one and day two will be from 9am to 5pm, and from 9:45am to 4:30pm on day three. There is also **non-scheduled time** *before and after* these times for small group and 1-1 meetings as well as personal time. The non-scheduled time is for you to plan.

There will be two scheduled 15-minute **breaks** and 1 hour 15 minutes for **lunch** each day. For those interested (*optional*), there will be thematic discussion tables over lunch.

## The Place and Space

We will spend the retreat at **Hyatt House**, at the Wharf DC:

[washingtondcthewharf.house.hyatt.com/en/hotel/home.html](http://washingtondcthewharf.house.hyatt.com/en/hotel/home.html)

725 Wharf Street SW, Washington, D.C. (+1 202 554 1234)

This venue was selected for this event because it offers bright and airy spaces for us to meet as a large group and as smaller groups. Please use the indoor and outdoor spaces as they are helpful. Go for a walk & talk outside, sit by the water, meet on some sofas, or chat by the bar. There are many comfortable spaces for you to think, discuss, meet, and work. There is work to be done but we also want you to feel like this has been a bit of a retreat for you.

## The Supporting Documents

The following are supporting documents for you to use during this retreat, and are found in this booklet:

APPENDIX I: Our Strategic Plan, pages 40-61

APPENDIX II: Who's Who, pages 62-93





## The Agenda

Wednesday, December 5		
8:30-9:00	Arrivals and Breakfast	
9:00-9:40	Overview & Maximizing Our Time Together & Guidelines	9
<b>LOOKING FORWARD: OUR NEW PLAN</b>		
9:40-10:05	A Vision, Mission, and Core Values to Lead Us into the Future	11
10:05-10:45	Our Strategic Plan: What is Different, What is the Same	12
<b>BREAK – 15 min.</b>		
11:00-11:05	Storytime	13
11:05-12:00	Who's Who	14
12:00-1:00	World Café – What is each program team up to?	15
<b>LUNCH – 1 hr. 15min.</b> <i>Eat with others around a topic of interest - optional</i>		
2:15-2:20	Storytime	16
2:20-3.20	World Café - <i>continued</i>	16
<b>BREAK – 15 min.</b>		
3:35-3:40	Storytime	17
3:40-4:40	Being a Learning-Focused Organization	17
4:40-5:00	Closing	20
5:00-6:00	Personal and Small Group Meetings and Networking - <i>optional</i>	



Thursday, December 6		
8:30-9:00	Arrivals and Breakfast	
9:00-9:10	Welcome Back! Overview of Today & Storytime	21
<b>LOOKING FORWARD: PUTTING OUR PLAN INTO ACTION</b>		
9:10-9:40	Linking Our Strategic Objectives to the Initiatives	21
9:40-10:45	A Deep Dive into the Initiatives: Session 1	23
<b>BREAK – 15 min.</b>		
11:00-12:00	A Deep Dive into the Initiatives: Session 2	25
12:00-1:00	A Deep Dive into the Initiatives: Session 3	27
<b>LUNCH – 1 hr. 15 min.</b> <i>Eat with others around a topic of interest - optional</i>		
2:15-2:45	A Deep Dive into the Initiatives: Tax	29
2:45-3:30	Debrief in Initiative Groups	29
<b>BREAK – 15 min.</b>		
3:45-3:50	Storytime	30
3:50-4:50	A Creative Competition	30
4:50-5:10	Closing	31
5:10-6:00	Personal and Small Group Meetings and Networking - <i>optional</i>	
<b>7.00pm - PARTY! Ambar Capitol Hill, 523 8th St SE</b> <a href="http://www.ambarrestaurant.com/home-page-washington">www.ambarrestaurant.com/home-page-washington</a>		



Friday, December 7		
9:15-9:45	Arrivals and Breakfast	
9:45-10:00	Welcome Back! Overview of Today & Storytime	32
<b>LOOKING FORWARD: THE ROLE LEARNING WILL HAVE</b>		
10:00-11:20	Learning as an Individual and as a Program	32
<b>BREAK – 15 min.</b>		
11:35-12:45	Learning as an Organization	35
<b>LUNCH – 1 hr 15 min.</b> <i>Eat with others around a topic of interest - optional</i>		
2:00-2:05	Storytime	36
<b>ENSURING OUR SUCCESS: MY COMMITMENT</b>		
2:05-3:15	IBP’s Onliness Statement & Impact Storytelling Brainstorm	36
<b>BREAK – 15 min.</b>		
3:30-3:35	Storytime	37
3:35-3:55	So, Now What?	38
3:55-4:15	Committing to Making a Difference	39
4:15-4:30	Closing	39
4:30-5:30	Personal and Small Group Meetings and Networking - <i>optional</i>	



## WEDNESDAY, December 5

### Welcome!

### An Overview of Our Time Together

Let's hear from Jennie about the theme of the retreat and how this agenda came to be. Then, let's **review** the agenda for our time together, on pages 6-8. At your tables, **share**:

- *What are you most excited about? Why?*
- *What part of the agenda will help connect us more to each other? To the organization?*

### Maximizing Our Time Together

The Planning Team has worked hard to design and plan a great 3-day event that is meaningful, fun, interesting and helpful for each of you. However, they now need YOU to help make this event a big success. On your own, **consider** these questions:

- *Name 2 people you want to meet up with during this event. When will you meet them and for what reason?*
- *Name 1 country or project you are curious about. What is it and who do you want to reach out to?*
- *Name 1 way you want to stretch at this event. What do you want to challenge yourself to do or NOT do here?*

**Write** your plans in the box below.

My Plans
2 people I want to meet up with:
1 country or project I am curious about:
1 way I want to stretch myself at this event (mentally, physically, emotionally e.g. I am a big talker so at this retreat I want to listen more; I know a lot about Africa, but I want to learn more about Asia):

When all are ready, **share** your plans in pairs.



## Our Guidelines

For this event, we are rooting the guidelines in the six core principles of Dialogue Education that many of us are familiar with.

- *How will we ensure safety, respect, inclusion, immediacy, relevance, and engagement in our work together this week?*

### 6 Core Principles for Learning



At your tables, **write** one guideline per principle on the large colored sticky notes provided, and **post** them on the relevant principle on the wall.

For example, to ensure respect at this event we will:

- “be fully present with each other”
- “let people finish speaking before adding our own thoughts”
- *What do you notice with all that we posted?*



## LOOKING FORWARD: OUR NEW PLAN

### A Vision, Mission, and Core Values to Lead Us into the Future

As you listen to a presentation by Warren, **consider** these two questions:

- *What excites you about what you hear?*
- *What values are most important to you? Why?*

#### Vision and Mission

IBP believes in a world where:

- Citizens claim the right to understand and influence how public money – their money – is raised and spent.
- Public budget decision-making processes include spaces for meaningful deliberation and engagement of poor and marginalized communities most affected by budget decisions.
- The public budget is an expression of societal values aimed at reducing poverty and inequality.

To achieve this vision, IBP works in collaboration with multiple actors – including civil society, state actors, international institutions, and most recently the private sector – to bring about a world in which empowered citizens participate in open, inclusive budgeting processes to shape policies and practices that promote equity and justice on a sustainable basis.

On your own, **jot** down a few important notes for yourself.

At your tables, **discuss** the questions above that you considered as you listened to Warren.



## Our Strategic Plan: What is Different, What is the Same

A presentation by Warren. As you listen, **consider** these questions:

- *What does this new plan mean for IBP as an organization?*
- *What does it mean for your role in the organization?*

On your own, **jot** down a few important notes for yourself.

At your tables, **discuss** the two questions above.

Then, **write** in one word on the large colored sticky notes on your table and **post** them on the wall:

- *What your table is most excited about in the vision, mission and values?*
- *What your table is most excited about in the strategic plan?*

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**LET'S TAKE A BREAK (15 minutes)**

Grab a coffee, have a chat and start your BINGO sheet

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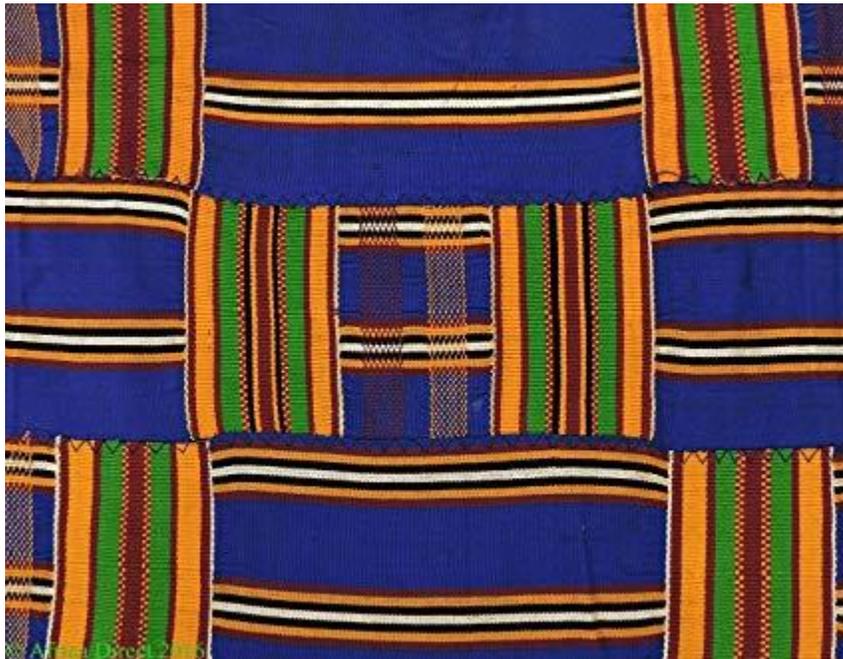
## Weaving in a Story

IBP turned 21 this year! A lot of learning and a diverse group of people have contributed to our history over the years. During these segments over the course of the next 3 days, we will hear some of the stories that make IBP who and what it is. Let's hear our first IBP story, this one by Ann.



As you listen, **consider** this question:

- *What one word summarizes that story for you?*





## Who's Who

The purpose of this activity is to introduce ourselves to one another and learn more about who is in the room.

On your table there are colored sheets. **Grab** one and **hold onto it** for the duration of this activity.

We will read a prompt, and you will be invited to **get up** and **stand** by the sign that best describes the category you belong in. We will pause here to observe. While there you will have a few minutes to **discuss** a question or two with others standing nearby.

We will then shout “COLORS!” and you will go to the sign that matches the color on your paper. While there you will have a few minutes to discuss a question or two with others standing nearby.

These are short conversations of no more than 2 minutes—speak with as many different people as you can!

### Prompts and Categories

*Prompt: What is your favorite genre of movie?*

Categories: Comedy / Action / Drama / Documentary

*Prompt: How many tattoos do you have?*

Categories: Zero / One / Two / Three or more

*Prompt: How long have you been in IBP?*

Categories: Less than a year / 1 to 3 years / 3 to 6 years / 6+

*Prompt: What best describes the previous sector you worked in before coming to IBP?*

Categories: Civil society / government / academia / private sector

*Prompt: What region of the world does your work at IBP focus on?*

Categories: Latin America / Africa / Asia / Global

Then, let's **share** our thoughts together on these questions:

- *What did you notice or wonder about as you were moving around the room meeting people?*
- *How might this exercise have been different 10 years ago?*
- *What gaps stood out for you?*



## World Café - What is Each Program Team Doing?

What is each program team working on? How are they getting ready to implement IBP's strategic plan? The head of each program team will sit at different tables around the room. In your designated groups, we will change tables every 12 minutes - move sequentially by lettered table when you hear the bell ring.

Program Spokesperson (4 minutes):

- *What have been the key activities of the program?*
- *What are the priorities for this program as we get ready to implement IBP's new strategic plan?*

Group dialogue (8 minutes):

- *Where does my work intersect with this program?*
- *What are our questions about this program?*

Policy (Vivek)	A	Fundraising (Catherine)	F
SPARK (Rose)	B	Communications (Anand)	G
TTAN (Ann)	C	SALT (Brendan)	H
Finance (Claudio)	D	Climate (Delaine)	I
Operations (Virginia)	E	GIFT (Juan Pablo)	J



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**LET'S HAVE LUNCH (1 hr 15 mins)**

Enjoy lunch and join a topic table for some interesting conversation (optional!)

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## Weaving in a Story

Let's hear another IBP story, this time from Tom.

As you listen, **consider** this question:

- *What one word summarizes that story for you?*



## World Café - What is each program team doing, *continued*

Policy (Vivek)	A	Fundraising (Catherine)	F
SPARK (Rose)	B	Communications (Anand)	G
TTAN (Ann)	C	SALT (Brendan)	H
Finance (Claudio)	D	Climate (Delaine)	I
Operations (Virginia)	E	GIFT (Juan Pablo)	J

**Consider** all you have just heard.

- *What was most striking for you? What surprised you?*
- *Who do you want to talk to more about their program or possibilities for collaboration?*

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**LET'S TAKE A BREAK (15 minutes)**

Grab a coffee, have a chat and continue your BINGO sheet

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## Weaving in a Story

Let's hear another IBP story, this time from Rose.

As you listen, **consider** this question:

- *What one word summarizes that story for you?*



## Being a Learning-Focused Organization

On your own, **remember** a time when you had an experience at work where you learned something that helped you think differently about what you were doing, and what you changed as a result:

One of IBP's core values is "learning." But, what does it mean to hold and work from this core value? What does it mean to be an organization that is learning-focused or learning-centered? What would we need to change, start or stop doing to fully embrace this core value?

On your own, **read** the definition of this value from our strategic plan:

**Learning**

We strive to cultivate an environment of learning within IBP to ensure that it is an effective organization. To this end, we document our work and its impact, provide spaces to critically evaluate our efforts, and regularly integrate those lessons into our strategies and operations. We endeavor to understand and document our successes and failures and use both as opportunities to learn about ourselves and our work. This evidence-based approach to learning permeates all that we do.

Let's listen to Warren talk about why learning is a core value in IBP and **consider**:

- *What do you like about it?*
- *What are you excited about?*



As with many aspects of our strategic plan, as we work out what this value should look like, our understanding of it is deepening. The more we consider this value (and other values in the strategic plan), the more we realize values need to be embraced and demonstrated in all we do. Values are a way of being and working, and our values should be clearly visible internally and externally. *Values need to permeate throughout.*

We offer this model for consideration in the hope that it pushes our thinking.





On your own, **reflect** on this diagram and **consider** this question:

- *How is your thinking about learning as an IBP value being stretched?*

After a few minutes, **share** your ideas with someone beside you.

Let's have a closer look. As we continue our work, we need to better understand the implications of this value in a model such as this.

In pairs, **walk** around the room and **offer** ideas on the following question:

- *What spaces exist for intentional learning in each of the areas of the model?*

**NOTE:** You will notice that a few areas are not posted. We will look at these areas on Friday.

As a group, let's **debrief** by discussing the following:

- *How does this model and way of thinking of what it means to be a learning centered organization strengthen other IBP values also named in our strategic plan: transparency, accountability, democracy, collaboration, excellence, and optimism?*
- *What has you considering new and unexpected aspects of IBP and our work when thinking about learning as an organizational value in this way?*
- *What feels quite provocative (yet important) when considering how to ensure IBP truly becomes "learning-focused", and that we hold this value with deep integrity?*

Thank you for all you offered here! We will now take this work and further plan to ensure the value of learning in all we do.



## Closing

Thanks for a great day! To close our day, let's take some time to celebrate our accomplishments and offer a bit of feedback.

At your table, **discuss** and then **write** on the evaluation forms on your table:

- *What was the highlight of the day?*
- *What helped your learning today?*
- *What suggestions do you have for tomorrow?*

On your own, **consider**:

- *What was said today that was important for you to hear?*
- *Who are you happy to have met today? Why?*
- *Review the goals you wrote at the start of day. Note what you have accomplished so far.*





## THURSDAY, December 6

***Welcome Back!***

**An Overview of Today**

**Weaving in a Story**

Let's hear another IBP story, this time from Carlene.

As you listen, consider this question:

- *What one word summarizes that story for you?*



### LOOKING FORWARD: PUTTING THE PLAN INTO ACTION

Yesterday, we connected with each other and with our new strategic plan. Today we will focus on what brings this plan to life – how the five initiatives contribute to IBP's strategic objectives, and how each of our individual roles and program teams contribute to each of the initiatives.

#### **Linking Our Strategic Objectives to the Initiatives**

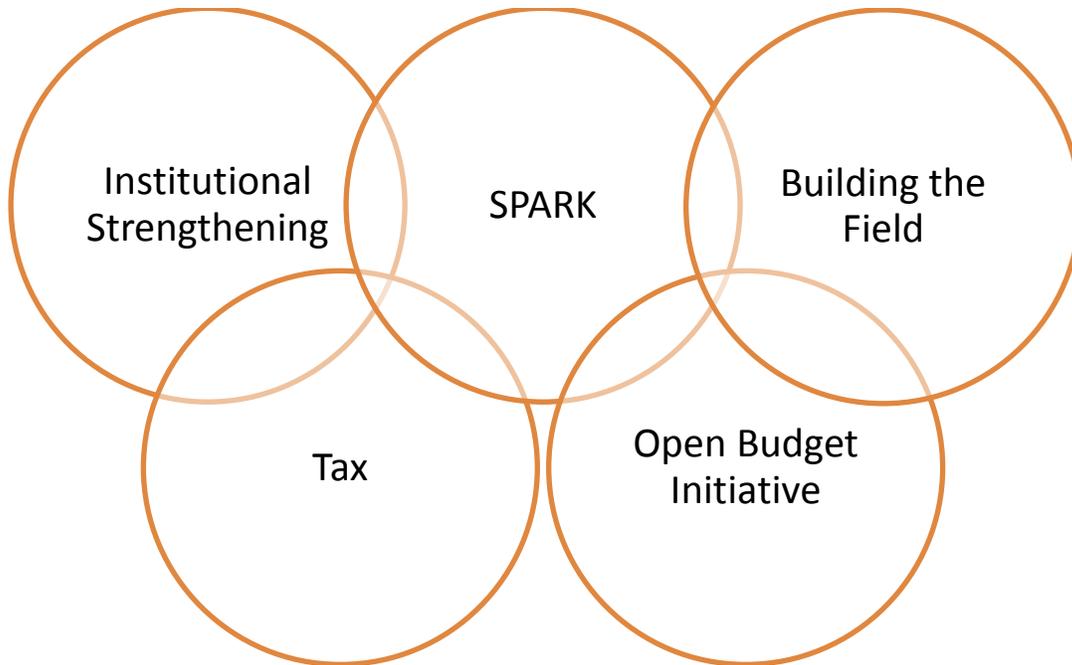
IBP's strategic plan identifies three strategic objectives that drive all of our work:

##### Three Strategic Objectives

1. Active and Empowered Citizens Influence Public Budget Processes and Policymaking that Affects Their Lives.
2. Governments and Other Actors Fulfill Their Responsibility to Provide Transparent Budget Information and Opportunities for Citizens to Engage Meaningfully in the Budget Process.
3. Government Budget Policies Are Based on Fair Taxation and Targeted at Effective Service Delivery and Equitable Distribution of Public Resources.



Vivek will give a short overview of these objectives and how they feed into IBP’s mission. Jennie, Vivek, Warren and Virginia will then speak to how each of the five initiatives in the strategic plan contribute to each objective.



## A Deep Dive into the Initiatives

As you will have just heard, IBP’s strategic plan outlines five key initiatives that interweave to help achieve its three strategic objectives. While it may seem that each of our individual roles and teams contribute to only one or two of these initiatives, it is important that we deepen our understanding of how each individual, team, and initiative effectively contributes to all five initiatives.

Over the next three and a half hours, we will explore how each initiative weaves together from the strategic objective level to the day-to-day activity level. Building on what is outlined in each initiative’s one-page summary ([see handouts](#)) and what we learned in yesterday’s World Café session on each team’s key activities for the coming year, each initiative group (SPARK, Building the Field, Open Budget Initiative, and Institutional Strengthening) will meet ‘one-on-one’ with each other for one hour to discuss the questions given below. A shorter session on the Tax initiative will follow.



## Deep Dive - Session 1

### MAIN ROOM

Open Budget Initiative (Initiative A) & Institutional Strengthening (Initiative B)

### LOBBY

Building the Field (Initiative A) & SPARK (Initiative B)

Each meeting space will have tables that have a number from 1-6. Find your name on the handout you received today (and also on the screens) that shows the small group breakouts for this session and go to the table with your group number.

In your small group, **discuss** the following questions as they relate to Initiative A for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative A?*
2. *In any way big or small, how do each of your teams contribute to Initiative A?*
3. *What aspects of Initiative A need to work well for Initiative B to succeed?*
4. *What potential challenges of Initiative A could negatively impact Initiative B?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!)

Personal notes:



Continuing in your small group, discuss the following questions as they relate to Initiative B for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative B?*
2. *In any way big or small, how do each of your teams contribute to Initiative B?*
3. *What aspects of Initiative B need to work well for Initiative A to succeed?*
4. *What potential challenges of Initiative B could negatively impact Initiative A?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!).

Personal notes:

At the end of the 30-minute discussion, have one or two people from your group **post** your half-sheets on the flip chart papers on the wall.

As a large group, **spend** 20-25 minutes in a plenary discussion, using the following questions as guide:

- *What groupings on the flip chart paper do you agree or disagree with?*
- *What other aspects or challenges have been missed that you would add?*
- *What is something new about how your role, your team, and/or one initiative contributes to the other initiative that you had not thought of before?*
- *How have these discussions made you think differently about your work? About IBP's work?*



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**LET'S TAKE A BREAK (15 minutes)**

Grab a coffee, have a chat and continue your BINGO sheet

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## Deep Dive - Session 2

**MAIN ROOM**

Open Budget Initiative (Initiative A) & SPARK (Initiative B)

**LOBBY**

Building the Field (Initiative A) & Institutional Strengthening (Initiative B)

Each meeting space will have tables that have a number from 1-6. Find your name on the handout you received today (and also on the screens) that shows the small group breakouts for this session and go to the table with your group number.

In your small group, **discuss** the following questions as they relate to Initiative A for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative A?*
2. *In any way big or small, how do each of your teams contribute to Initiative A?*
3. *What aspects of Initiative A need to work well for Initiative B to succeed?*
4. *What potential challenges of Initiative A could negatively impact Initiative B?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!)

Personal notes:



Continuing in your small group, discuss the following questions as they relate to Initiative B for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative B?*
2. *In any way big or small, how do each of your teams contribute to Initiative B?*
3. *What aspects of Initiative B need to work well for Initiative A to succeed?*
4. *What potential challenges of Initiative B could negatively impact Initiative A?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!).

Personal notes:

At the end of the 30-minute discussion, have one or two people from your group **post** your half-sheets on the flip chart papers on the wall.

As a large group, **spend** 20-25 minutes in a plenary discussion, using the following questions as guide:

- *What groupings on the flip chart paper do you agree or disagree with?*
- *What other aspects or challenges have been missed that you would add?*
- *What is something new about how your role, your team, and/or one initiative contributes to the other initiative that you had not thought of before?*
- *How have these discussions made you think differently about your work? About IBP's work?*



## Deep Dive - Session 3

### MAIN ROOM

Open Budget Initiative (Initiative A) & Building the Field (Initiative B)

### LOBBY

Institutional Strengthening (Initiative A) & SPARK (Initiative B)

Each meeting space will have tables that have a number from 1-6. Find your name on the handout you received today (and also on the screens) that shows the small group breakouts for this session and go to the table with your group number.

In your small group, **discuss** the following questions as they relate to Initiative A for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative A?*
2. *In any way big or small, how do each of your teams contribute to Initiative A?*
3. *What aspects of Initiative A need to work well for Initiative B to succeed?*
4. *What potential challenges of Initiative A could negatively impact Initiative B?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!)

Personal notes:

Continuing in your small group, discuss the following questions as they relate to Initiative B for 15 minutes:

1. *In any way big or small, how do each of your individual roles contribute to Initiative B?*
2. *In any way big or small, how do each of your teams contribute to Initiative B?*



3. *What aspects of Initiative B need to work well for Initiative A to succeed?*
4. *What potential challenges of Initiative B could negatively impact Initiative A?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from Questions 3 & 4 (one sheet per point; write big!).

Personal notes:

At the end of the 30-minute discussion, have one or two people from your group **post** your half-sheets on the flip chart papers on the wall.

As a large group, **spend** 20-25 minutes in a plenary discussion, using the following questions as guide:

- *What groupings on the flip chart paper do you agree or disagree with?*
- *What other aspects or challenges have been missed that you would add?*
- *What is something new about how your role, your team, and/or one initiative contributes to the other initiative that you had not thought of before?*
- *How have these discussions made you think differently about your work? About IBP's work?*

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### LET'S HAVE LUNCH (1 hr 15 mins)

Enjoy lunch and join a topic table for some interesting conversation (optional!)

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## Deep Dive - Tax

A key new area of work for IBP in this strategic plan is tax, and we are still in the early stages of our thinking about this initiative. Let's hear from Warren on why IBP has decided to work on tax, what we think this work will look like, and what steps we are taking to get started.

After you've heard from Warren, sit with your initiative and **brainstorm together**:

1. *What aspects of the tax initiative need to work well for your initiative to succeed?*
2. *What potential challenges of the tax initiative could negatively impact your initiative?*

Using the half-sheets provided, **select** one member of your group to write down the key points raised from these questions (one sheet per point; write big!) and **post** them on the wall.

Let's hear a sample.

## Debrief in Initiative Groups

With your colleagues from your initiative, **discuss** what stood out for you during the earlier conversations.

- *What came up in today's earlier discussions that excites you?*
- *What do you need from the other initiatives to move forward?*
- *What are the action steps your team(s) are going to take in the short-term and in the coming year?*
- *What else is coming to mind?*

Personal notes:



## LET'S TAKE A BREAK (15 minutes)

Grab a coffee, have a chat and continue your BINGO sheet

### Weaving in a Story

Let's hear another IBP story, this time from John.

As you listen, **consider** this question:

- What one word summarizes that story for you?



### A Creative Competition

Whoever is at your table is your team. Your task is to **create** an advertisement, the topic of which will be revealed at the beginning of this session! The format is up to you - you are welcome to use the materials provided (flip chart paper, markers, art supplies), create a skit, or any other creative medium you choose.

Each table will then have 3 minutes to present their advertisement.





## Closing

Thanks for another great day! To close our day, let's take some time to celebrate our accomplishments and **offer** a bit of feedback.

At your table, **discuss** and then **write** on the evaluation forms on your table:

- *What was the highlight of the day?*
- *What helped your learning today?*
- *What suggestions do you have for tomorrow?*

On your own, **consider**:

- *What was said today that was important for you to hear?*
- *Who are you happy to have met today? Why?*
- *Review the goals you wrote at the start of the retreat. Note what you have accomplished so far.*





## FRIDAY, December 7

*Welcome Back!*

**An Overview of Today**

**Weaving in a Story**

Let's hear another IBP story, this time from Vivek.

As you listen, **consider** this question:

- *What one word summarizes that story for you?*



## LOOKING FORWARD: THE ROLE LEARNING WILL HAVE

**Learning as an Individual and as a Program Team**

On the first day, we talked about learning as a *value* in IBP, and why it is important for all aspects of the organization and its work. Today we are going to dig a bit deeper and think about what that value means in practice for us individually, in our programs, across the organization and at a strategic level.

Take a moment and **re-read** how learning is defined in our organizational values.

### Learning

We strive to cultivate an environment of learning within IBP to ensure that it is an effective organization. To this end, we document our work and its impact, provide spaces to critically evaluate our efforts, and regularly integrate those lessons into our strategies and operations. We endeavor to understand and document our successes and failures and use both as opportunities to learn about ourselves and our work. This evidence-based approach to learning permeates all that we do.

Let's listen to Brendan and Virginia recap how learning has been woven into our discussions throughout the retreat and connect that to IBP's learning journey more broadly.



Now, **reflect** on what you do in your work to learn:

What do I want to learn about in my work? In my team? And in IBP?
How do I evaluate and learn from what I do?
How do I regularly and intentionally integrate those lessons strategically and operationally?
How does my team regularly and intentionally integrate lessons strategically and operationally?

After 10 minutes, **turn** to the person beside you to **share** your thoughts.

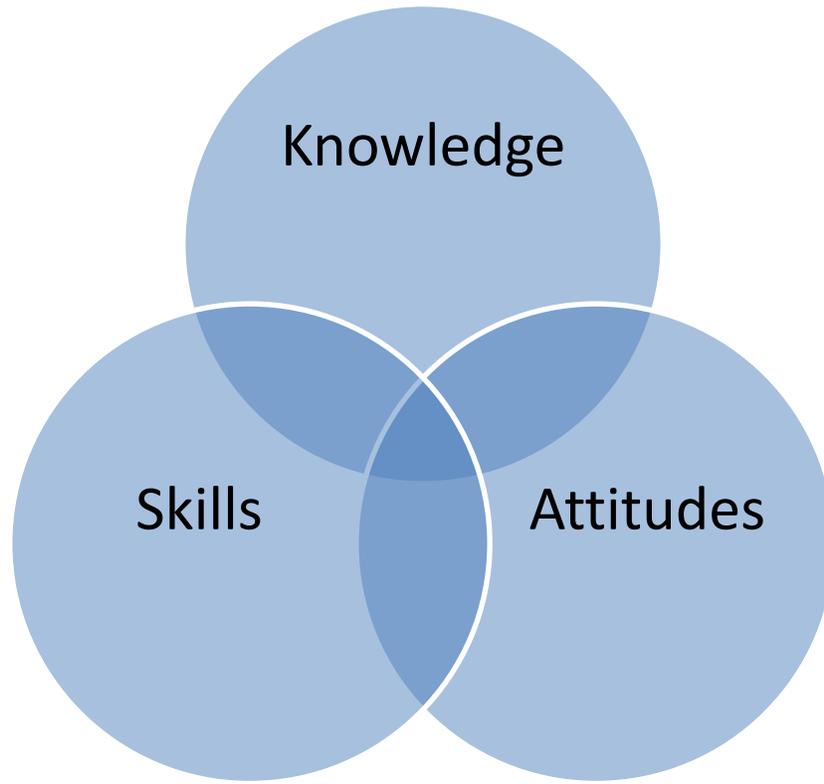
- *What was challenging in this exercise?*
- *What had you not thought of before?*
- *What ideas came to mind for you?*

Let's **share** thoughts on these questions at your tables.

Then, let's **hear** a sample of what is being discussed from around the room.

As we have now identified, *learning is something we all do*. How do we learn as an organization? What needs to be in place to ensure that we can all learn - individually and collectively?

Let's start by considering what skills, knowledge, and attitudes are needed to learn.



At our tables, **name** skills, knowledge, and attitudes we need individually and collectively to strengthen our ability to truly be a learning-centered organization. **Write** these on sticky notes and **post** them on the corresponding flip chart papers on the wall.

Let's take a few minutes and **review** what has been written.

- *What do you notice from what is posted?*
- *What can we do to build the capacities identified?*

---

**LET'S TAKE A BREAK (15 minutes)**

Grab a coffee, have a chat and continue your BINGO sheet

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## Learning as an Organization

So, how does this all fit together? Let's **listen** to Brendan and Virginia talk about what IBP needs to learn about strategically and operationally to ensure it is being effective, impactful and delivering on its objectives.

At your tables, **discuss**:

- *How do these questions connect to your work?*
- *Where are there gaps? What would you add to what you have heard?*
- *What is emerging about why this is all important?*

What more does it take to be a learning organization? Let's **weave** together the conversations we had during the learning session on the first day and the conversations we have had today. At your tables, **discuss** the following questions:

- *In what ways does IBP create and support a learning environment? What more does it need to do?*
- *What obstacles do we encounter when trying to learn? What might be ways around those obstacles?*

Let's **hear** a sample of the discussions and continue the conversation as a group.

On your own, take five minutes to **reflect** on everything you have heard in this session.

- *What new insight did you gain?*
- *What actions can you undertake to further your learning, that of your team, or for IBP more broadly?*

What I will do to further learning:

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### LET'S HAVE LUNCH (1 hr 15 mins)

Enjoy lunch and join a topic table for some interesting conversation (optional!)

---



## Weaving in a Story

Let's hear another IBP story, this time from Elena.

As you listen, **consider** this question:

- *What one word summarizes that story for you?*



## IBP's Onliness Statement & Impact Storytelling Brainstorm

Throughout the retreat, we have heard several stories from our colleagues highlighting IBP's unique history and staff. While celebrating diverse perspectives, how do we articulate a unique point of view that ties all of these stories together and that also gives other team members a strong starting point for telling their stories?

Joining us today is Abigail Fisher, strategist from Hyperakt, a design and brand studio our Communications team is working with to help us strengthen the way we articulate who IBP is and why the work we do matters. She will guide us through an exercise that will get our creative juices flowing and help us explore how to describe IBP through something called an "Onliness" statement. It's a simple framework for helping us identify what makes IBP unique from all the other players in the landscape.

Personal notes:

After hearing from Abigail and Anand, turn to the people sitting next to you to form a group of four and **craft** an onliness statement about IBP using the worksheet provided.

Remember:

1. It's not just about stating who you are and what you stand for, it's about staying how you are **DIFFERENT** from everyone else
2. Positioning is about simplifying. There won't be room to say everything. You have to make hard decisions to say more by saying less



3. De-jargon, de-jargon, de-jargon. Use words that your children, friends, and grandmother would understand.

After ten minutes, join another group of four and work together to **refine** your statements into one. **Write** your statement on the flip chart paper.

Let's share our experience with this exercise with the group.

- *What was frustrating? What was easier than expected?*
- *What did you learn about your colleagues' views of IBP?*

Let's **listen** to each group share their onliness statement. As a group, let's **discuss**:

- *What do people like about these statements?*
- *What are the most striking similarities?*
- *Where are there big differences?*

The onliness statement tells us how IBP is unique at a high level. Now we will brainstorm impact stories that support our onliness statements as emotionally-resonant, specific proof points. After hearing Abigail talk about what makes a good story, use the worksheet provided and brainstorm as many stories as you can think of individually. The goal is to come up with as many stories as possible. There are NO bad ideas!

To wrap up, let's listen to Anand and Abigail talk about how the work we did today during this session will feed into IBP's storytelling work in the coming year.

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### LET'S TAKE A BREAK (15 minutes)

Grab a coffee, have a chat and continue your BINGO sheet

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## Weaving in a Story

Let's hear a final IBP story, this time from Paolo.

As you listen, **consider** this question:

- *What one word summarizes that story for you?*





## ENSURING OUR SUCCESS: MY COMMITMENT

### So, Now What?

Sit with your program team and **consider** all you have learned over the past 3 days.

**Make** an action plan.

- *What is the first thing you want to work on together when you are back at the office?*
- *What program team do you have to reach out to first?*
- *Name one way you plan to share your successes and stories with others?*

Who	Will do what	By when

Write some of your ideas on a colored card and hang it on the wall.



## Committing to Making a Difference

It is also important that each of us take personal ownership of some of the change moving forward. What 2-3 things do you need to do in the next 2-3 months to start the change and ensure IBP is well on its way to success?

I will: <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>
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**Share** your plan with someone you haven't talked to much over the past 3 days.

## Closing

After watching the video Anand has created over the past three days and hearing some parting words from Warren, please **share** your good-byes and well-wishes with each other. *Weaving our way forward, we are stronger together!*





## APPENDIX: IBP's Strategic Plan

### INTRODUCTION

As the most important economic policy tool available to governments, public budgets can exclude citizens and skew public resources to the powerful, or they can play a leading role in promoting inclusion and redressing inequality. Recognizing this, the International Budget Partnership (IBP) was founded just over 20 years ago<sup>1</sup> on the premise that meaningful citizen engagement can open up budget processes and promote policies that reduce poverty.

In the years since IBP's founding, the field of budget transparency and accountability has made impressive strides: policy and advocacy work has led to a dramatic shift in international norms and country practices supporting more open budget processes, while civil society groups have increased their capacity to take advantage of these openings to influence public budgeting. Our own work, corroborated by independent review, has confirmed that more transparent budget processes which facilitate public engagement can lead to more equitable distribution of public resources, as well as better overall fiscal management.

The field of budget transparency and accountability, however, is at a critical juncture. One long-growing challenge has been that significant gains on transparency have not been met with commensurate improvements in policies. A new, pivotal challenge is that political and economic trends have shifted from supporting the goals of many civic actors and the IBP to acting as imposing impediments. Democratic recession, rising inequality, systemic corruption, and constrained domestic resources all threaten to stall, if not reverse, gains in open budgeting.

Part and parcel to these threats is that citizens are increasingly distrustful of governments and their ability to govern in the interests of the majority of citizens, let alone the poorest. The work of IBP and its partners can play a vital role in combatting this distrust. Budget work can provide citizens and governments with ongoing opportunities throughout the year to turn this citizen disaffection into active engagement – to rebuild the democratic fabric of society and maximize the efficiency and equity with which public resources are used.

Twenty years ago, IBP set out an ambitious vision to pioneer civil society engagement in budgeting at a time when this idea contrasted sharply with international norms and practices and there was little available civil society capacity. Having made progress on substantial parts of its mission, IBP believes it has the opportunity to set a new vision for the field – to ensure that open budgets are used most effectively to truly transform lives. The spaces that have been opened, the techniques that have been tested, the strong groups that have emerged around the world, and a shared understanding of what needs to be done suggest that with the innovations and approaches discussed below, we can achieve decided progress on this ambitious new dream as well.

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<sup>1</sup> IBP was originally established in 1997 as a project of the Center on Budget and Policy Priorities, and became an independent institution in 2015.



## **ABOUT IBP**

### *Vision and mission*

IBP believes in a world where:

- Citizens claim the right to understand and influence how public money – their money – is raised and spent.
- Public budget decision-making processes include spaces for meaningful deliberation and engagement of poor and marginalized communities most affected by budget decisions.
- The public budget is an expression of societal values aimed at reducing poverty and inequality.

To achieve this vision, IBP works in collaboration with multiple actors – including civil society, state actors, international institutions, and most recently the private sector – to bring about a world in which empowered citizens participate in open, inclusive budgeting processes to shape policies and practices that promote equity and justice on a sustainable basis.

### *How we work*

Leading the field of fiscal transparency and accountability for more than 20 years, IBP has taken on the challenge of making public finance systems worldwide more open and accountable by:

- Incubating and strengthening budget-focused civil society institutions in countries around the world;
- collaborating with civil society partners and other accountability actors within countries to achieve measurable improvements in how public money is collected and spent on delivering critical public services to poor and marginalized communities;
- producing research and analysis on country budget systems, processes, and policies and the impact of civil society engagement in budgeting; and
- engaging international and country stakeholders to promote improved budget systems, practices, policies, and outcomes.

Today, IBP works within a broad-based, vibrant community of country-based civic actors. To carry out our Open Budget Survey, we collaborate with independent groups and researchers in over 100 countries, training them on our survey methodology and on dissemination and advocacy strategies. Our Learning Network brings together about 40 civil society groups with whom we have deeper relationships, to facilitate peer exchanges, promote learning and sharing of best practices across borders, and conduct collaborative research and advocacy projects. Finally, our direct presence in a few key countries is characterized by the most intense set of partnerships with local civil society groups, providing them with financial and technical assistance, helping them articulate their campaigns and engage in budget processes.

We create capability for effective dialogue and constructive engagement between civil society and governments, but we also engage directly with state actors – finance ministries, sector ministries, parliaments and auditors – at the international and country level, to advise them on and advocate for opening budget processes and promoting more equitable policies. We also work with donor agencies, international institutions and multi-stakeholder initiatives (including the World Bank, International Monetary Fund, the Global Initiative for Fiscal Transparency, and the Open Government Partnership) to strengthen international standards for fiscal openness and encourage governments to undertake



ambitious reforms to comply with them. In recent years, IBP has also started to connect with private sector actors – including investors and rating agencies – to see what role they might play as advocates for fiscal openness, based on the importance of transparency for improving fiscal stability and the overall investment climate.

### What makes us effective?

**IBP’s unique value proposition is in our singular, evidence-based focus on applied public finance, our deep commitment to building local agency and our ability to meld technical expertise with high-level advocacy.**

- **We have core expertise in public finance systems:** IBP is the leading international civil society organization with dedicated capacity in applied public finance. Our approach is focused on building civil society capacity in country, which will in turn promote accountable fiscal systems.
- **We know how to nurture independent institutions:** Civil society has traditionally been excluded from budget processes. IBP has deep knowledge and tested methods to build country-based civil society institutions with the skills and legitimacy to participate effectively in budget processes.
- **We build strong peer networks:** We work collaboratively with the leading country-focused budget organizations in the world. We have deep experience in network building and peer engagement, reflecting our understanding that international peer learning is vital to support civil society organizations in emerging fields.
- **We have unique multi-stakeholder access and broad credibility:** Two decades of high quality work have given IBP credibility and strong relationships at grassroots, national, and international levels – with civil society, governments and international institutions. This allows us to connect issues and actors within and across countries in ways other groups cannot.
- **We are deeply committed to documenting, learning and adapting:** We strive continuously to be a learning organization. We regularly embed reflection in our programs and we change and adapt our practices based on lessons learned. We also convene stakeholders in the field to generate shared learning, and our research on open budgeting has made major contributions to the evidence base for the field as a whole.

## **STATE OF THE FIELD**

In sharp contrast to two decades ago – when transparent and inclusive budgeting was considered inefficient at best and economically dangerous at worst – there is now an international consensus that citizens have a right to information and to participate in the budget process, and that their voices can contribute to greater equity in decisions about how public resources are raised and spent. This shift in norms has been ratified by the UN and is supported by all major international financial institutions including the World Bank and International Monetary Fund.

Alongside these shifts, there has been dramatic growth in civil society capacity to utilize public information to analyze and influence public budgets. Whereas two decades ago, virtually no civil society organization was deeply engaged in budget analysis and advocacy, independent institutions with such capacity now exist in all parts of the world. While much of this work is on public spending, in recent years there has



been a sharp increase in work focusing on government revenue transparency, administration, and equity, reflecting the global development focus on increasing domestic revenue generation.

This changed discourse and civil society capacity have led to concrete improvements. The most significant of these is the contribution to increased budget information available to the public. Led by middle-income countries, such as Brazil, Mexico, South Africa, and Indonesia, budget transparency has expanded steadily for most of the past decade. Significant gains have also been recorded in low-income and fragile countries, such as Afghanistan, Benin, and the Democratic Republic of Congo. While most countries still do not provide sufficient information or opportunities for citizen engagement to ensure accountability, the gains have been impressive.

Several reports have also documented growing evidence of the impact of civil society efforts on budget policies and outcomes. For instance, a report by Development Finance International, IBP, and Oxfam America examines the tangible impact of budget work in a large number of countries.<sup>2</sup> It cited case studies showing “that increased transparency has often been a major factor in increased and improved Millennium Development Goals budget allocations” in 18 countries. This report also found that various civil society efforts to promote transparency and engage in budget monitoring and advocacy have “contributed to more effective and efficient spending, leading to improved outcomes” in more than 25 countries.

## THE CHALLENGE AHEAD

The undeniable progress that has been made on budget transparency is far from complete, however, and there are increasing concerns about the sustainability of progress in open budgeting. Eighty-nine countries out of 115 covered in IBP’s 2017 Open Budget Survey still score 60 or below (out of 100) on the Open Budget Index, the score designated as indicating a sufficient level of transparency on fiscal policies<sup>3</sup> to allow for meaningful citizen engagement. Among these, 20 still score 20 or below, providing scant or no budget information to their citizens. The average score for citizen participation in public budgeting processes is even more worrying, at a mere 12 (out of 100).

In addition, despite some of the encouraging evidence mentioned above, the ability of civil society to catalyze changes on a larger scale, and to use budget information to drive transformative changes in poverty and inequality, is still limited. While there have been some important shifts in terms of changed discourse and open budget practices, these have not yet led to transformational shifts in policies and improvements in the quality of people’s lives. This undoubtedly reflects strong political resistance to more equitable taxation and distribution of public resources, as well as systems of corruption that have been exposed – but not eliminated – by greater openness. However, it may also stem from the inability of donor approaches focused on top down macro-fiscal interventions and civil society approaches that are too local and fragmented to significantly affect national policies and outcomes.

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<sup>2</sup> Development Finance International, International Budget Partnership, and Oxfam America, “From Numbers to Nurses: Why Budget Transparency, Expenditure Monitoring, and Accountability are Vital to the Post-2015 Framework,” IBP Budget Brief, October 2014. <http://internationalbudget.org/wp-content/uploads/Budget-Brief-From-Numbers-to-Nurses.pdf>

<sup>3</sup> The Open Budget Index covers government provision of public information on revenues, spending, borrowing and performance.



Organizations across the open governance sector are now confronting the challenge of catalyzing deeper social change by searching for new thinking that will move beyond a narrow focus on transparency to broader collective action strategies to achieve the more tangible impacts that have thus far been elusive. Specifically, there is a growing understanding of the ways in which seemingly straightforward tools and strategies for increasing openness have run up against entrenched interests and power structures that concentrate wealth and privilege and exclude poor and marginalized groups. What is needed are approaches that open up budget processes in more meaningful ways, and build more effective reform coalitions that can navigate complex political dynamics to affect policy change.

Compounding this challenge, over the next five to ten years, non-government actors seeking to influence public budgeting will face a more challenging context. Across the developing world, donor support for the democracy and governance agenda – including transparency, participation and accountability – is gradually losing traction. Many of the key government champions that pioneered open government practices over the past 20 years are no longer in power, replaced by authoritarian or illiberal regimes. As a consequence, civil society groups are likely to find themselves with less external support and fewer domestic allies. Moreover, they are increasingly under pressure from governments sharply reducing civic space for journalists, civic organizations, and other independent voices.

Compounding the closing of political space, in many parts of the world inequality of income and wealth is growing, while fiscal crises are leading to calls for greater austerity, reducing available resources for progressive policies. As a result, societies are becoming increasingly fractured and polarized by tribalism and populism, which exploits economic, cultural and security fears through new communications networks and technologies. This is diminishing the role of rational policy discourse and evidence-based policy-making. The winners are a small, growing class of powerful actors. The losers are poor and marginalized communities, as well as the working and middle classes increasingly shut out from opportunities to influence government decision-making, including policies on taxation and spending.

The situation is not all bleak, though. The recently agreed Sustainable Development Goals and the Paris Climate Agreement have potentially far-reaching implications for global development. Both agreements shine a spotlight on domestic resource generation, creating an exceptional opportunity to drive greater openness and citizen engagement on domestic tax policy, traditionally the most closed aspect of the budget process. At the same time, anger at inequality, corruption, and lack of public accountability has helped to spark new forms of civic mobilization that are commanding global attention. The result is the possibility of unusually broad coalitions – much broader than those traditionally convened over the last decade by open government advocates – which can combine with the organizing and communicating power of new technologies to generate new impacts. There is ground for hope, no doubt, but open budget activists will need to find new allies and new ways of working, if they want to tread this new path successfully.

## **A NEW AGENDA FOR FISCAL ACCOUNTABILITY**

More than 20 years of research, advocacy, in-country programming and work alongside local CSO partners has taught IBP much about what works – and what doesn't work – in the field of budget transparency and accountability.

Past tools and approaches were effective in achieving many of the low-hanging fruits in areas of transparency, participation and accountability, but current efforts to further deepen openness and get governments to adopt better targeted and more equitable policies are running up against the challenging



realities of entrenched interests and power structures. Increasingly, we see that the primary challenges facing the field are political, rather than technical in nature.

This requires rethinking and broadening our role in supporting civil society groups and coalitions, empowering them to engage more actively with politics of budget processes. It also means we need to engage more strategically with state actors in promoting a culture shift towards more openness and responsiveness to civil society inputs and demands. Government responsiveness depends on complex dynamics where different actors come together through formal and informal processes to shape budget decisions, and where powerful interests can – and often do – trump broader calls for equity and justice.

How can we then develop approaches that employ deep knowledge of the political economy of public budgeting to further open budget processes and bring about policy change that takes the needs of poor and marginalized people into account?

Through our experience, and other available evidence, we have found that civil society engagement in public budgeting is more likely to be successful when: (a) it is embedded in broader civil society, rather than limited to budget-focused groups, and builds partnerships with accountability actors and champions in government; (b) it occurs in – or contributes to the creation of – enabling environments with reasonable public information and participation opportunities and functioning oversight institutions; (c) it responds in a timely way to political opportunities, such as citizen mobilization resulting from corruption scandals. These three lessons inform the core of our approach and the design of the key initiatives presented below in this strategic plan.<sup>4</sup> Going forward, each initiative will embed these insights into their strategies.

Over the next five years, IBP will work to promote inclusive sustainable development through three interlinked objectives focused on building active and empowered citizens, open and inclusive budget processes, and budget policies that promote equity and justice.

### **Strategic Objectives**

- 1. Active and Empowered Citizens Influence Public Budget Processes and Policymaking that Affects Their Lives.** We believe that citizens must be active and empowered through collective action to engage in budget processes, influence policy choices and effectively hold their governments accountable. IBP will continue to play a vital role in supporting civil society groups through training, technical assistance and networking, to strengthen their budget monitoring skills and help them to develop more effective communication and advocacy strategies. By reaching out to a broader set of actors, we will also help build powerful coalitions that are better positioned to leverage budget information and engage across levels of government decision-making, increasing the likelihood of government responsiveness and policy change.
- 2. Governments and Other Actors Fulfill Their Responsibility to Provide Transparent Budget Information and Opportunities for Citizens to Engage Meaningfully in the Budget Process.** Available

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<sup>4</sup> See Larsen, Jillian. “You Cannot Go It Alone: Learning from Cooperative Relationships in Civil Society Budget Campaigns”. International Budget Partnership. 2016 (<https://www.internationalbudget.org/publications/learning-from-cooperative-relationships-civil-society-budget-campaigns/>); Fox, Jonathan and Halloran, Brendan (eds.) with Anna Levy, Joy Aceron, Albert Van Zyl. “Connecting the Dots: Civil Society Policy Monitoring and Advocacy Strategies,” Report from International Workshop, June 18-20, 2015, Washington, DC: Transparency and Accountability Initiative, Social Impact Lab, G-Watch, International Budget Partnership, School of International Service, February, 2016 (<http://www.transparency-initiative.org/uncategorized/1166/connecting-the-dots-for-accountability/>).



budget information, participatory processes, and robust oversight can influence and shape the possibilities for civic actors to engage in an informed and meaningful way. IBP will continue to pressure governments and other actors, both directly and through our partners, to create and strengthen the enabling conditions for fiscal accountability. This includes publishing more and more useful information, providing adequate opportunities for citizen engagement, and ensuring that oversight bodies function effectively. We will do this by collecting evidence and assessing practices around the world, strengthening international norms and standards, and working with collaborative networks of international and domestic actors to test and build capacity for innovative practices.

- 3. Government Budget Policies Are Based on Fair Taxation and Targeted at Effective Service Delivery and Equitable Distribution of Public Resources.** When budget processes are open, and citizens actively engaged, governments will come under more pressure to target budget policies to reductions in poverty and inequality. The opportunities for graft will also be reduced. To date, IBP has largely focused its policy work on budget processes – a macro approach that has made significant strides in reframing norms and standards. To generate policy impact at larger scale, IBP will engage more directly in strategic advocacy, supported by research, on critical policy issues at the country, regional and global level, including on tax and climate finance, building on and complementing our partners’ efforts.

We know that there is no magic sequence or combination of interventions that guarantees success. Budget transparency is a key ingredient, but it is not sufficient. Nor is pressure from civil society organizations, although evidence confirms that such organizations can make a critical contribution to fiscal transformation. Indeed, the critical learning question for IBP going forward is: What combinations of information and participation work together through the political process of budget-making in different contexts to bring about measurable, sustainable social change? This question and our strategic objectives are captured in the initiatives below. Our revised theory of change, presented in Appendix 1, articulates the broader system in which the work of IBP and our partners take place. Building on IBP’s strengths and achievements, these four initiatives will position IBP to catalyze and support such joined up approaches within the systems and contexts in which we operate at international, national and local levels.

## **KEY INITIATIVES: THE FOCUS OF IBP’S WORK IN 2018-2022**

In order to achieve its strategic objectives, IBP will structure most – though not all – of its work through the four key initiatives outlined below, which build on past learning and are designed to test innovative approaches to civic engagement while consolidating the enabling environment for open budgeting.

### **1. SPARK (Seeding Public Accountability for Results and Knowledge)**

Advances in civil society engagement in budget processes have often fallen short of the impacts needed to truly democratize budgets for more equitable outcomes. Ordinary citizens, especially the most marginalized, are still excluded from the budgeting process while other groups in society are given preferential treatment, and governments feel no pressure to change this status quo.

The SPARK initiative tests a bold new approach to improving fiscal accountability at the country level, building on the following lessons and evidence from IBP’s own experience, as well as broader learning from our partners:



- Citizens are most likely to mobilize around public programs and services that affect their quality of life. Collective organizing and action is essential to enable them to shape decision making, bolstered by the technical capacities to navigate public finance and accountability processes.
- Where civil society work on budgets has generated significant change to people's lives, it has involved partnerships with actors that have broad legitimacy and power, such as trade unions, faith-based networks, and other membership-based organizations that are representative of citizens.
- In addition to leveraging powerful civil society coalitions, successful budget advocacy has benefited from strong links with government actors, including combinations of legislators, auditors, and champions in the executive.
- Achieving impact crucially depends on context. Given the complex and constantly changing nature of country contexts, adequate tools for robust analysis and ongoing monitoring are needed, alongside more experimental and adaptive approaches to program planning.

Building on these lessons, SPARK will support and leverage public engagement around service delivery issues that affect citizens' lives as an entry point to shaping budget processes and outcomes in the directions of justice, inclusiveness and democracy. In other words, it will use citizen demands to drive budget advocacy. SPARK will develop partnerships between IBP teams and civil society partners (both formal civic actors and more informal movements led by citizens). These collaborations will work to identify a service delivery issue of common interest and importance to broad groups of citizens. IBP will help expose the budgetary reasons for poor service outcomes and provide multifaceted, intensive support to partners that enable them to engage in fiscal governance processes, navigate the accountability ecosystem, analyze political dynamics, build wider coalitions and strategize, reflect and learn. Ultimately, we aim to bolster the countervailing power of these coalitions to shape budget processes and outcomes for the long term.

SPARK will work in seven countries. IBP already has a strong presence in three of these countries, India, Kenya, and South Africa, and will establish a presence for the first time in Ghana, Indonesia, Nigeria, and Senegal. Each SPARK country strategy, while retaining a sharp focus on developing approaches that reflect country-specific contexts, will share the following components:

- ***Bolstering agency from the bottom up:*** Ensure through tailor made technical support that poor and marginalized groups can meaningfully engage in shaping fiscal and service delivery decisions and implementation that affect them through strengthened collective political agency and technical capacities. Ensure the sustainability of such agency by building the people, institutions, resources and repertoires of collective action that can hold and develop this work over the medium to long term.
- ***Supporting broader reform coalitions:*** Provide actors inside and outside the state, from coalition partners to reform-minded champions inside government, with incentives and capacity to pursue meaningful reforms that democratize budget processes. Such partnerships will help achieve scale in impacting systems by bringing larger numbers of credible actors into engagement with the state.
- ***Strengthen and leverage the accountability ecosystem:*** Support partners to navigate and leverage the budget accountability ecosystem (including formal and informal actors and mechanisms such as media, national audit institutions, legislators, CSO watchdogs, etc.), to strengthen their engagement in fiscal governance and service delivery.



- **Improve the enabling environment:** Promote opportunities for meaningful engagement of poor and marginalized individuals in the budget process. This can include pushing for more detailed information disclosure and more meaningful participatory mechanisms, as well as negotiating with and supporting governmental actors to create or strengthen participatory mechanisms.
- **Influence ideas and discourse:** Produce evidence and narratives that shape information, ideas, norms and discourse around fiscal governance in a way that supports SPARK's strategic objectives. This will involve engagement with media, traditional and digital, to shape decision makers' ideas and incentives. This will also involve information and narratives that helps shape citizens' understanding and, more importantly, engagement around key service delivery, fiscal governance, and accountability issues that connect to our partners' campaigns and systems change efforts.

SPARK will make important contributions to all three of IBP's strategic objectives, by supporting and empowering active citizen engagement in budget processes around specific service delivery challenges, by pushing for more open and accountable budget processes, and by advocating for better targeted and more equitable budget policies. In doing this, SPARK will develop and rely on strong linkages with all of IBP's other programs and initiatives, on assessing and addressing the capacity building needs of our country partners, on improving transparency, participation and oversight in budget processes, and on promoting collaborative research on relevant policy issues, including tax.

## 2. Increasing tax revenues and equity

While IBP and IBP partners have historically focused most attention on government expenditures, tax policy is central to IBP's mission. The raising of public financial resources reflects government policy priorities on poverty reduction just as much as public expenditures do, and tax decisions directly impact lives by providing resources that benefit citizens in ways that redress inequality or reinforce the privilege of a powerful few. We also believe that if tax decisions are made in a transparent, inclusive, and just manner, citizen faith in democratic governance can increase, and greater public support for higher revenues may develop.

Many developing countries now face unprecedented pressure to raise additional domestic revenues to fund development. Against the backdrop of anticipated reductions in global aid flows, both the Sustainable Development Goals and Paris Climate Agreement established in 2015 explicitly and implicitly emphasize that an increase in domestic resource mobilization will be needed to generate the resources necessary to implement their goals. The subsequent Addis Tax Initiative commits the 40 countries already signed up to greater domestic resource mobilization for development<sup>5</sup>.

Whether the necessary amount of revenues are indeed raised, and whether they are raised through policies that generate greater equity, will depend on the outcomes of complex policy issues and trade-offs,<sup>6</sup> and on the forces shaping any decisions. Absent the involvement of nuanced and strong pro-equity

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<sup>5</sup> The Addis Tax Initiative -- endorsed by 40 countries, as well as key international organizations, regional organizations and funders -- commits countries to greater domestic revenue mobilization for development.

<sup>6</sup> It is not automatic, for instance, that greater tax receipts will be raised in ways that are congruent with greater equity; at the same time, adequate program funding may very well be unachievable through progressive taxes alone. Note also that one commonly-noted tradeoff, between higher taxes and robust economic growth, is frequently overstated. Taxes can fund investments in infrastructure and people that promote economic growth, have less of an impact on personal work and investment decisions than is often



forces from civil society, tax policies will continue to be unduly influenced by the wealthy, who bring considerable experience, leverage, and relationships to their efforts, and can be more concerned with tax subsidies and lower tax rates than with raising adequate revenue in a just manner.

Although country-based civil society is increasingly engaged in the critical tax debates that are unfolding, in most low- and middle-income countries there is still only a modest amount of work being done by NGOs and it is insufficient to tackle the complexity and scale of the issues involved. International NGOs have ramped up their engagement on tax work, but these efforts have been largely focused on cross-country issues such as the taxation of multi-national corporations or financial secrecy.

Civil society tax work has also been hampered by the continued biases of many government officials: they view taxes as an in-house matter and their public justifications include assertions that tax issues can only be comprehended by tax experts (who often work for corporations or wealthy clients). Their private justifications can sometimes be more nefarious; government officials keep decision-making processes closed so they are better able to dole out favors to those who will favor them in return.

For all these reasons, IBP has decided to launch a significant program focused on supporting civil society capacity for tax policy analysis and advocacy in developing countries. Our decision to do so is informed by two field scans, consisting of interviews with our country partners, INGOs, donors, and academics, that produced an overwhelming consensus that IBP can add significant value, working alongside organizations already active in this field such as Tax Justice Network Africa, Oxfam International, and the International Center for Tax and Development.

IBP's proposed work will build the skill base and political capability of a diverse range of country-based civic actors to engage in tax policy debates and processes, and to link them to debates on public spending and development more broadly. These partners, together with IBP, will strive to influence the politics and institutions that govern tax decisions to promote revenue growth and benefit the poor. In the process, we will also challenge the norms of closed tax processes to secure the enabling conditions necessary for effective civic engagement.

To complement our work supporting local civil society, IBP will also build its own tax policy analysis capacity and profile. Although IBP has traditionally been known for its expertise in budget process issues, over the next five years we will expand this expertise to budget policy issues, beginning with our intensive effort on tax and focus on country tax policies, where there is a significant void in civil society capacity and knowledge.

We aim to work in conjunction with other existing efforts in this space – whether undertaken by our own partners or by regional and international NGOs – as appropriate. More specifically, over the next two years to the extent that our finance and capacity allows we will undertake the following projects:

- Formally collect and organize information on existing civil society tax work, and related literature, and make that information more readily accessible to civil society practitioners through dedicated sections of our website and a new tax feature in our widely-read monthly newsletter.

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asserted, can keep deficits and thus interest rates down, and can bind a country together by funding social protections and public services – thus building a foundation for economic growth.



- Convene discussions with other civil society and academic actors to begin to build a shared understanding of what works in this field, and what collaborative efforts might support more effective interventions going forward, including on linking taxation and expenditure.
- Leverage the results of our latest Open Budget Survey, digging deeper into best current tax transparency practices around the world, as well as efforts to open opportunities for meaningful citizen engagement in the tax process.
- Convene a multi-stakeholder group to develop and test narratives that could help civil society organizations, policymakers, and citizens understand the importance of tax policy to quality public services, reducing inequality, and a vibrant democracy, and the related importance of civil society's role in tax debates.
- Strengthen the capacity of selected civil society partners – starting with experienced partners that already have some capacity and interest in tax work – through training and technical assistance, including workshops and materials on the fundamentals of tax policy and tax administration, on promoting transparency and participation in tax processes, and on good practices in linking work on tax and spending to address poverty and inequality.
- Pilot a small number of collaborative projects on relevant tax issues, focused on increasing domestic resource mobilization in equitable ways, and carefully document their progress and impact. These could build on the model we are currently testing in a collaborative research and advocacy project on tax expenditures and their impact on inequality with nine Latin American partners.

We intend to undertake this work with a focus on learning about both what can make civil society tax work effective and in what contexts, and about the niche that IBP and its partners can fill in this field. This will allow us to refine an agenda for a further three years that matches the ambition of our vision.

This initiative has the potential to contribute to all three of IBP's strategic objectives, given its multi-pronged focus on strengthening civil society capacity, improving government openness and promoting policy impact on tax policy and administration. To be able to do that, however, it will have to build strong collaboration with other parts of IBP. In fact, this new initiative has the potential to be a testing ground for a truly cross-program approach.

### **3. Building the Field**

At the core of IBP's vision has been the growth of civic organizations in the global south that specialize in budget analysis and advocacy. The number of these groups has grown considerably over the past 20 years, but the overall quality of the work is uneven, with scope for strengthening both analysis and advocacy approaches. At the same time, groups face a range of significant, often daunting challenges, including growing hostility to civic activism.

IBP's approach has been to promote peer-to-peer learning, reflecting the recent establishment of the field, and the relative isolation of groups with deep technical capacity in each country. Over the years, IBP therefore helped create a "learning network" comprising 40 of the leading budget organizations in the field, and which now benefits from relationships of trust and commitment built and nurtured over time. This network represents a core asset for the field, and one that also benefits all IBP programs. Through this initiative we plan to further consolidate the network and deepen its members' capacities and policy impact.



The continued vibrancy and value of the network will depend on its remaining relevant to the work of its members, by incorporating new organizations, tools, and approaches that are gaining traction around the world, including emerging responses to growing threats to civic space. To implement this work, IBP will continue regular communication with partners, facilitate and provide funding for horizontal exchanges, offer technical assistance, design action-learning projects, and convene partners' meetings.

To further deepen the work of the network, IBP will over the next two years:

- Invite 10 – 15 new members to join and help to diversify the network, including social movements, faith-based organizations and community networks, alongside organizations specializing in new fields of work, such as tax and fiscal policy. We will look to other IBP initiatives, such as SPARK and tax, to help identify and draw in new members. At the same time, we will work with members to document and learn from approaches, such as strategic litigation, that might prove effective within closing space environments.
- Follow-up on a pilot to provide partners with tailored technical assistance on strategic communications, an area often identified as a common weakness undermining the impact of budget organizations. Our aim is to invest in supporting a small number of partners that might benefit substantially from this support, and then ask them to build awareness of these skills more generally in the network. IBP will seek to learn from the different kinds of assistance provided, to see what types of support are most effective in enabling groups to use a rapidly-changing set of communication tools to address a growing range of problems around inequality and service delivery.
- Support a network of budget groups in Francophone Africa, a region that has traditionally received limited support but where civil society is energized by improvements in budget reforms. IBP has helped these organizations form a regional network and will provide general capacity building on budget analysis and advocacy for the network over the next two years. In addition, IBP will provide specially tailored technical assistance to three of the strongest of these organizations over the same period to ensure that the network has leadership and models of effective work the early on.
- IBP's vision of a world where budgets advance equity and justice cannot be realized without a focused effort to eliminate different types of discrimination in budgets (by race, income, geography, etc.) Driven by partners in several countries which are nested in especially marginalized communities, IBP will support work to produce a practical, experience-based, "how to" guide on analytical approaches and methodologies that groups can use to assess different types of discrimination embedded in budget revenues, allocations and expenditures.

The above work responds to the immediate needs of network members. In addition, IBP is looking ahead to secure the long-term vibrancy of the network and indeed the field. Our vision is a community that rests on a powerful group of key organizations based in different regions around the world, and enjoys solid, collaborative leadership with a strong southern voice. This network of leading regional groups will serve as a platform for collaborative research, training, and advocacy, where IBP and its country offices will be active members of the community, but not necessarily the primary drivers. To work towards this vision over the next five years, IBP intends to pilot two approaches:

- Leadership Development Initiative: IBP will pilot a program to enhance the resilience of key organizations in the sector, and to ensure broader collective leadership in the fiscal accountability movement. This project aims to enhance essential capacities like the strategic vision necessary to innovate while ensuring program coherence in meeting emerging problems, and issues like leadership



transitions that can cripple organizations. At the same time, as partners are increasingly outspoken on regional and international issues, we see an opportunity to cultivate collaborative leadership of our movement. To develop the program, we will work with leading practitioners and institutions specializing in leadership development to design an intensive two-year pilot program focusing on 10-15 leaders in the field.

- Cornerstone organizations project: IBP will also aim to pilot a project to test an intensive approach to strengthening three to five of our strong and most promising partner organizations, those who can play a key role in demonstrating excellence, providing leadership and capacity building, and pushing innovation. The aim is to enable these organizations to join five groups IBP already considers “cornerstone organizations” in the budget field, thereby increasing the number of essential “cornerstone organizations” to 10. To this end, we will provide institutional strengthening grants together with a range of technical assistance and mentoring, drawing on our deep experience with intensive approaches to institution building. These organizations will also participate in the Leadership Development Initiative outlined above.

This initiative mostly contributes to the first of IBP’s strategic objectives, given its focus on building a strong network of civil society groups. Through its support to collaborative policy work that involves both research and advocacy, it also contributes to the third objective. Some of its linkages to other initiatives, especially to SPARK and Tax, have already been highlighted.

#### **4. Open Budget Initiative**

IBP’s 2017 Open Budget Survey has documented a troubling stall in progress toward greater budget transparency. In some regions progress has even been reversed. The Survey also reveals limited oversight and weak opportunities for formal public participation in the budget process. These results are just the latest of many indicators suggesting that principles and practices of open and democratic government are in decline globally.

Clearly, IBP’s efforts to create the enabling conditions for the meaningful engagement of civil society in budget processes need to be redoubled. Without access to appropriate public information and opportunities to participate in the budget process, and without the support of independent oversight institutions, civil society cannot hope to negotiate the complex interests and politics at play in public budgeting.

We are particularly concerned with the Survey results on participation, where the global average score is just 12 out of 100. Civil society cannot hope to influence budget decisions if there are no mechanisms for citizens to make their voices heard in public debates around budget formulation and implementation. Moreover, without such opportunities, civil society is likely to lose interest in budget advocacy, further decreasing pressure for increasing transparency. Consequently, this initiative will increasingly focus on promoting participation as a key enabler of budget accountability, both directly and through looking at how transparency can facilitate participation, and at how citizen engagement with other formal institutions can strengthen budget oversight.

The Open Budget Survey will continue to be a flagship product of this initiative, and during 2018-2019 we will explore ways we can adapt the survey to more actively encourage and track government progress in implementing meaningful public participation mechanisms, while ensuring the comparability of data with earlier surveys. We will also engage more directly with a broad range of civil society organizations to better understand how we can make the survey a more potent tool for supporting their



broader efforts to promote transparent and accountable governance. And we will help governments understand the specific steps they need to take to improve their transparency and accountability practices, based on the results of the 2017 survey. Following this period of research, analysis and outreach, we plan to publish the next round of the Open Budget Survey in 2020, and subsequent rounds every two years.

We will also step up our engagement with partners, governments, donors, and potential private sector allies to ensure that the survey results are used, and to boost and monitor government commitments to reforms. Our vision is that the initiative will develop a broader body of research and advocacy work to complement the survey, with an increasing focus on promoting meaningful citizen engagement in budget processes.

Towards this goal, in the coming years we will undertake the following three significant projects:

- Building on the Survey results, we will work intensively as a founder and steering committee member of the Global Initiative for Fiscal Transparency (GIFT) to address the lack of participation opportunities in budget processes. While the Survey has identified some interesting examples of public participation at various points of the budget cycle, and GIFT has compiled some useful case studies, further work is needed on a comprehensive guidebook and a more systematic assessment of these mechanisms. IBP will work with GIFT to develop these materials, which can be used by governments interested in promoting participation and to further strengthen the normative framework for participation. Based on that work, we will set up pilot projects in 4-5 countries – prioritizing SPARK countries and GIFT network members – to either introduce new participatory mechanisms or to make existing mechanisms more robust and inclusive.
- We will investigate the issue of budget credibility, specifically how and why budget expenditures deviate from approved budgets. This work reflects the consistent finding in the Open Budget Survey that public information on budget allocations is stronger than information provided on actual spending. Our aim is to understand the extent of the problem, the practices that enable it, and its impact on resource allocation and government performance. Large deviations between planned and actual expenditures discourage civic engagement in the budget process, and addressing these issues may release significant resources for inequality and poverty reduction. The work will entail a large cross-country survey, as well as in-depth work in a select number of countries. It will also involve engaging with various stakeholders across a few countries to identify potential solutions for improving budget execution.
- To strengthen budget oversight, we will test ways in which civil society can work with national audit bodies to make audit work more effective. The weak position of Supreme Audit Institutions (SAIs) is among the most important accountability gaps around the world. An important reason for this weakness is that government actors do not feel sufficient pressure to respond to audit findings and recommendations, and often simply ignore them. Ensuring that citizens understand the role of auditors and audit findings, and that organized civil society works with auditors, media and legislators to raise the profile of these findings might help ensure adequate follow-up. To test this hypothesis, we will pilot an action and learning initiative in five countries where SAIs have showed an interest in collaborating with CSOs; in each country a partnership between civil society and the national SAI will focus on profiling a small number of important audit recommendations that have been neglected by government through communications and government outreach. The initiative will aim to pressure



governments to effectively address these adverse findings, while showing the benefits of collaborations between auditors, civil society, and other actors.

These activities – alongside others that will be undertaken by the initiative – are designed to strengthen the enabling conditions for meaningful citizen engagement in budget processes, and therefore contribute mainly to IBP’s second strategic objective. By building the capacity of civil society groups to better understand participatory mechanisms, budget execution challenges and audit work, however, the initiative will also contribute to more active and empowered citizens – IBP’s first objective. The initiative will also have a more limited and indirect contribution to IBP’s third strategic objective. Given the initiative’s strong focus on country-level activities, its linkages with SPARK will be particularly important for ensuring consistency and complementarities.

## HOW WE WILL LEARN FROM THE INITIATIVES

For IBP to be successful as we test new approaches, enter into new areas of work, and navigate a more challenging context in many countries, we will have to invest in meaningful learning on all fronts. This learning will be guided by strategic questions that we will seek to answer over the coming years. Some of our initial questions include:

1. How can we contribute to more meaningful public engagement around fiscal governance issues through professional civil society efforts, organizations and movements that enable collective citizen action, and other formal and informal spaces in which citizens seek to participate in decisions about public resources?
2. How can our evidence-based advocacy efforts bring about meaningful reforms rather than superficial shifts or isolated changes that are easily reversed or undermined by deeper factors? How can we better understand and analyze the factors that enable or undermine the reform efforts we are supporting?
3. How can we promote more integrated and strategic approaches that connect the dots between different actors and entry points, and leverage these to contribute to systemic and sustainable changes?
4. How can we better understand the power dynamics that often lead to exclusionary budget processes and outcomes? What approaches can we undertake directly – or support indirectly – that shift power to citizens demanding more democratic and equitable systems and outcomes?

These are challenging questions, none of which we will be able to answer easily or definitively. We plan to further refine them and develop specific hypotheses to test in each of our projects and the contexts in which we work. We won’t be able to answer them alone either. We will engage a number of partners (CSOs, academic institutions, donors, etc.) to promote joint learning around these and related themes and questions. This includes the Learning Collective at the Transparency and Accountability Initiative and a partnership with the Institute for Development Studies at the University of Sussex and the Accountability Research Center at American University to embed action research in SPARK country programs.

We will also engage in learning through multiple modalities, including: (a) *Research*: IBP will undertake and commission research that speaks to the above questions in different domains of public resource governance, and collaborate with partners who share a similar research agenda; (b) *Embedded learning*: IBP will engage in action research and other kinds of ‘real-time’ learning through all of our programs,



engaging our partners in regular reflections on our collective efforts, helping to draw out strategically relevant insights, and integrating those into practice; and (c) *Rigorous assessment*: IBP will leverage robust evaluation methodologies to look back on our efforts and better understand whether and how they contributed to change processes and outcomes, exploring what our influence on those changes was vis-à-vis other relevant factors.

## **INSTITUTIONAL STRENGTHENING**

Since separating from the Center on Budget and Policy Priorities and becoming an independent organization in 2015, IBP is a significantly stronger institution. Over the past year alone, our efforts have included introducing new management structures and associated delegation of responsibility, and hiring of a new senior program director, our first director of development, and a new director of communications. We have also maintained a strong focus on establishing systems, policies and ways of working that effectively undergird our program initiatives.

However, if the ambitious plans outlined in this document are to be realized, our leadership, management and systems capacity must keep pace. As IBP takes on exciting new areas of work while consolidating existing core programs, we will also seek to position the organization as a strong, resilient, effective, and sustainable institution for the long term. In particular, our programmatic expansion will demand clear, accountable, and sustainable governance, stronger human resource, communications and learning competencies, and rock solid financial sustainability and management. We will do this by:

### *Strengthening organizational leadership and governance*

As IBP is still quite young as an independent institution, our leadership, governance structures and ways of working are still evolving. In 2016 we established an executive management team to oversee the organization, and a strategic leadership team with responsibility for strategy. Building on this foundation, we will work to further define and document the mandate and function of these two teams, and establish and document decision-making processes to empower accountable decision making in an increasingly decentralized IBP structure. We will also prioritize investing in our sustainability by identifying and nurturing future leaders; as well as developing clear succession plans for senior leadership, including our Executive Director. Through a modest expansion of the size of our committed Board, we will look to bolster the alignment between Board capacity and IBP's strategic direction, ensuring that the IBP Board brings the thematic knowledge, geographic, gender and racial diversity that represents our stakeholder groups and the potential to extend our external networks and circles of influence. We will also continue to work with the Board to deepen governance practices by developing the Board committee structure, and policies and support that will optimize the Board's contributions.

### *Strengthening core competencies*

Ambitious programmatic initiatives such as SPARK and work on tax policy will significantly increase IBP's staffing level within the next two years. We will be working in more countries, and in an increasingly decentralized environment. This has tremendous implications for staff recruitment, onboarding, performance management, ongoing support, and organization culture. To ensure that IBP's systems and support services keep pace, over the next five years we will: develop human resource policies and practices to ensure IBP is a fair and competitive employer in all of the places we work, including strengthening our recruitment, orientation, performance monitoring and staff development policies; develop robust, context appropriate security protocols, and sustain an organizational culture that



continues to embody our values statement. IBP will continue to actively encourage diversity, and further strengthen this area by establishing rigorous safeguards around discrimination and harassment as its operations expand globally.

IBP also recognizes the need to invest significantly in its internal and external communications capacity. Success in achieving our programmatic goals is directly linked to our ability to generate robust public dialogue on our issues, to effectively communicate the work of the organization and its partners, and to keep a growing, decentralized staff informed and engaged in the organization. Over the next five years, with new communications leadership in place, we will ensure that IBP is embedding strategic communications goals across all of our programming, utilizing a variety of platforms to raise visibility and promote stronger engagement in open budgeting by citizens and government stakeholders. We do not underestimate the challenges inherent in this work, as we adapt to changing communications technologies, operate in environments where public mistrust has never been higher and, in many cases, work in contexts where the power of rational argument and evidence are under attack. Those challenges will demand a communications plan that is flexible and opportunistic as well as strategic, and one that is designed to extend our networks and influence, as well as advance our programmatic goals.

Supporting all of our efforts, we will enhance our operational systems, data management platforms and documentation, upgrading financial systems for budget planning, accounting, payroll and payment processing, and optimizing use of CRM and contractual management tools. For our implementation, we will be working with a strategic partner of IT consultants that will not only provide support in network maintenance, security, and helpdesk, but implement key priorities such as cyber-security and systems integration solutions.

#### *Ensuring financial stability and resilience*

Sustainability is not just about income, it includes how IBP generates, manages and monitors financial resources. We must ensure that our processes and capacities are aligned to deliver this. Since becoming independent, IBP has maintained a conservative target of approximately \$12 - \$15 million in annual revenue, of which, if we use the 2018 board approved budget, approximately 60% is unrestricted general support. We will work actively to maintain a high proportion of flexible funding in our portfolio, however we also anticipate pressure on this model in an increasingly difficult and more competitive funding environment. In response, in 2018, with the organization's new Development Director in place, IBP will launch its first multi-year fundraising plan, which will seek to diversify sources of revenue beyond our traditional reliance on a small number of private foundations and other institutional donors, and engage new private and public supporters while maintaining a healthy balance of unrestricted vs. project-specific funding. This will include further investment in professional Development staff, with significant support from the new Communications team to help raise the organization's visibility and effectively communicate the IBP story, and from Finance staff to provide grants management and reporting assistance.

IBP will also ensure we have robust financial management systems in place, and to further the organization's financial stability we will commit to increasing our reserve fund from its current \$2.5 million to \$6 million by 2022. This will require raising funds earmarked for reserves from several sources, as well as ensuring that we achieve operational efficiencies and saving wherever possible.



## THE WORLD WE ARE WORKING TOWARD

IBP's ambitions for the future must be embedded in realistic and strategic optimism. Working over the past few years in a favorable economic environment, often with the collaboration of committed, reformist governments, we have frequently been able to take advantage of short cuts to reform or quick wins. We now face the more difficult task of working in a climate of fiscal austerity and political closure where we must invest in the longer route of building sustainable institutions and powerful coalitions. For this reason, much of our strategic plan focuses on consolidating our earlier gains, such as the civil society organizations and networks we have helped to build, and the global progress in open budgeting. Success in the next five years might well mean protecting existing institutions, preventing regressive policies and avoiding backsliding on past achievements.

Yet, we believe that there will also be opportunities to generate consequential change in the next few years, some cracks in the negative trends through which we can shine our light<sup>7</sup>. Governments come and go, and connecting with the right people within government can help shape and move reforms even in otherwise hostile environments. And new forms of citizen mobilization can provide renewed energy and pressure on governments to crack down on corruption and adopt progressive reforms, especially in policy areas, such as domestic taxation, that presently have high visibility.

Much of the strategic plan outlined in the preceding pages focuses on piloting and refining new approaches that can help bring about such change despite the obstacles. The emphasis on testing and learning is key to ensuring that our programs are more effective. In the end, however, all of the activities that IBP will conduct over the next five years are about achieving measurable impact on transforming systems, empowering citizens, and improving lives throughout the developing world.

Some of the outcomes we will focus on over the next five years are more directly dependent on our own efforts, and they include:

- A credible, nimble, global learning and action community of budget CSOs, led by sustainable southern institutions, which effectively enhances the quality of budget-focused work around the world and articulates strong, collective southern leadership and voice on budget accountability. This community will include up to ten robust “cornerstone organizations,” leading the field in tax and expenditure work, supported by solid institutional development.
- A vigorous and informed debate on the value of public participation in budget processes, and effective ways to promote it, based on the testing and documentation of powerful approaches to civic engagement throughout the budget process. These will draw on the innovative and practical experiences of interested governments in different country contexts, supported by IBP and GIFT.
- A deeper understanding, within IBP and in the broader field, around some of the issues raised in the key learning questions outlined above, including on how to build strong coalitions for policy reforms and on how to work with governments to promote meaningful participation in budget processes. This will result from rigorous learning approaches embedded in each of our four initiatives, testing clearly formulated hypotheses and allowing us to sharpen the impact of our work, clarify our theory of change and generate knowledge that informs the field.

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<sup>7</sup> See IBP's 2017 annual review of learning that further develops this theme: That's How The Light Gets In: Making change in closing political environments.

<https://www.internationalbudget.org/publications/making-change-in-closing-political-environments>

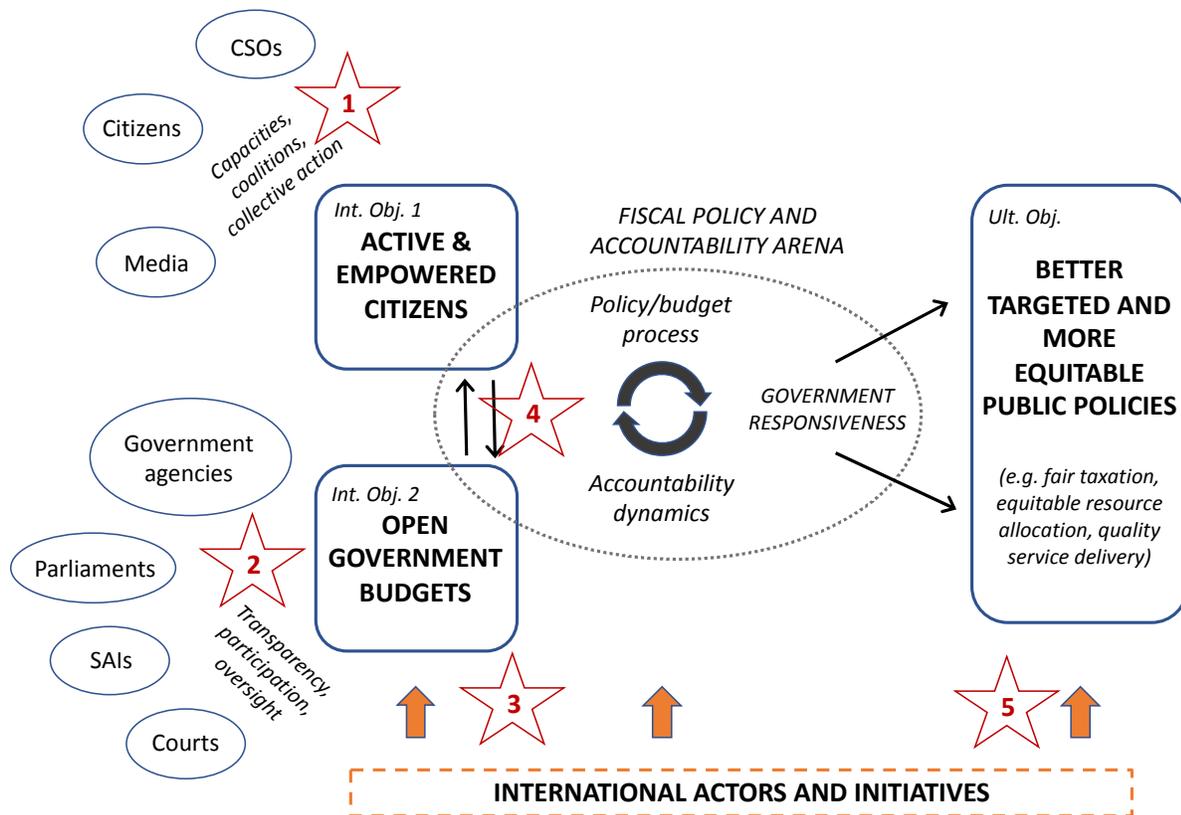


We will also aspire to more far-reaching impacts that will inevitably depend on many other factors well beyond our control. These include:

- Powerful civil society-led coalitions in a few countries secure substantial and sustainable gains in public expenditures and service delivery for poor and marginalized communities.
- Civil society research and advocacy drives effective campaigns to secure tax equity gains in a few countries around the world. These campaigns, together with IBP’s direct efforts, contribute to a major international debate and norms in favor of tax equity at country level.
- The declining trend in levels of budget transparency across the world as measured by the Open Budget Index is reversed, with a few countries pioneering replicable practices to ensure that transparency in budget information facilitates meaningful citizen engagement in public finance policy and practice.

None of the above will be easy to achieve, but twenty years ago very few among us imagined the kinds of changes that IBP would help to generate. We bring to this work 20-plus years of experience and an unprecedented network of strong CSO budget partners. IBP is committed to working with these powerful partners to contribute to practices that will advance measurable, meaningful gains for poor and marginalized communities. We are more determined than ever to sharpen our approach and invite new collaborators and supporters to join us in creating a more equitable, stable and just world for us all.

### IBP Theory of Change





IBP's goal is to ensure that governments raise and spend public resources effectively and equitably with the aim of promoting sustainable development. IBP believes that in countries where citizens are active, empowered and organized, budget systems are characterized by adequate openness and effective oversight, and international actors are engaged and supportive, that goal will more easily be achieved, as governments will be more responsive to citizen demands. More specifically, making progress on better targeted and more equitable public policies requires: (a) the existence of a civil society sector with strong skills and capabilities, engaged in broad coalitions that articulate clear demands and in collective efforts to hold governments accountable for their use of public resources; and (b) the provision of timely and detailed budget information, and the existence of opportunities for citizens to engage in budget processes and of effective oversight institutions, such as Parliaments, Supreme Audit Institutions (SAIs) and Courts.

However, we know that neither of those elements – or both of them together for that matter – are sufficient to realize our goal, and that in both areas we face a number of challenges. Weak capacities, a limited understanding of governments budgets and difficulties in overcoming collective action problems prevent citizens from organizing effectively. State actors are often suspicious of openness, and may embark on transparency reforms to bolster international legitimacy more than domestic accountability. The budget information that they provide is often not the information that citizens need, and participation opportunities tend to be superficial and unstructured. Oversight institutions many times lack adequate resources and incentives to do their job effectively. More generally, budget decisions are too often determined by political bargaining among influential actors within and outside government, including powerful corporate lobbies, rather than respond to the broader needs of citizens. We call this set of actors and norms and practices, both formal and informal, the Fiscal Policy and Accountability Arena, and recognize that it often results in low accountability, exclusion of disadvantaged groups and inequitable outcomes.

IBP activities across the four initiatives identified in the Strategic Plan – and depicted by the numbered red stars in the diagram above – are aimed at addressing some of the most important problems and challenges identified above, and adaptively respond to many of the lessons we've learned about them through our past work:

1. Given the importance of a network of strong civil society groups working on budget monitoring and advocacy for our ultimate objective, a heavy focus of our activities is in building the capacities of civic actors in actively engaging with budget policies and processes ([Star 1](#)). In different ways and at different levels, all four initiatives focus on strengthening civil society skills for analysis and communications, among other things. In addition, SPARK will put more efforts into promoting coalitions and strengthening collective action around service delivery challenges in our focus countries.
2. One of IBP's flagship products, the Open Budget Survey, has been and will continue to be key to our efforts at promoting open budgets across the world ([Star 2](#)), promoting the transparency, participation and oversight that are necessary for fiscal accountability. Increasingly, we will seek to engage with a broader set of actors in the budget accountability ecosystem, not just through the OBI but also in SPARK countries. We will also focus on pushing for more user-relevant information to be published and for more meaningful citizen engagement mechanisms, including on tax issues.
3. Part of our push for open governments budgets relies on working with relevant international actors and initiatives ([Star 3](#)) who have an influence on country practices through different means. We will



continue to leverage the legitimacy we gained with the OBS in our collaboration with a wide range of donor agencies, but will also broaden our engagement to include multi-stakeholder initiatives like OGP and GIFT, and relevant actors in the private sector.

4. The greatest challenge we are likely to face towards better targeted and more equitable public policies is in shifting country-level decisions towards better government responsiveness (Star 4), given the characteristics of the Fiscal Policy and Accountability Arena across many country contexts. By continuing to promote and facilitate a more constructive engagement between state and non-state actors, mostly through SPARK, but also through the OBI and through research, this is an area where we hope to learn more about how change happens and what role IBP can play in it.
5. Finally, through parts of our international-level research and advocacy work – including on tax issues – we hope to engage more directly and make our voice heard in international debates on equity in budget policies, with a view to contribute to a shift in thinking around the role that government budgets can play in promoting sustainable development (Star 5).

## IBP Values

IBP's Statement of Values is the expression of our core beliefs — those that define our priorities and goals, and in so doing, express our organizational identity and culture.

We believe in:

- **Transparency and Accountability.** Governments are the stewards, not the owners, of public funds — including those that are derived from natural resources and foreign assistance. Thus, we believe that they are obliged to strive for the highest standards of transparency and must be held accountable for their actions by the people who pay their salaries. Likewise, we hold ourselves accountable to our partners, donors, and other stakeholders, and deliver on our commitments in a transparent manner.
- **Democracy and Human Rights.** For us, this means that all people have the right to participate in public decision-making processes that affect their lives and to access the information that empowers them to participate meaningfully. Critical to democracy is active citizenship, which envisions citizens who are empowered both individually and collectively to advocate for change. Since rights are universal, we embrace diversity by working across a wide range of countries with different cultures and contexts. Our commitment to diversity is also reflected in the composition of our staff. The diverse backgrounds and points of view of our staff enrich our organization and our work. These values drive us to focus on strategies that we believe will improve the lives of all people, particularly the poor and marginalized.
- **Collaboration.** To fulfill our mission, we need to engage with a broad range of external actors, while fostering collaboration among IBP staff, all of which requires flexibility. We approach all of our engagements with partners and other stakeholders — as well as with each other — respectfully, working with them as peers to achieve our goals. We value the voices of our partners, provide spaces for them to be heard, and strive to promote their voices and messages at every available opportunity. We see ourselves as consensus builders who are strong but reasonable, and passionate yet humble.
- **Independence.** While we always seek ways to build bridges and establish connections, these bridges and connections are not made at the expense of our independence. Our strategies and our advocacy are evidence-based, and the strength of our work derives from independent, uncompromised research as well as thoughtful analysis.



- **Integrity and Ethical Behavior.** Consistent with our demand that governments be open, honest, and accountable to their citizens, we embrace openness and honesty in all aspects of our work. We strive to ensure that the ways in which we work and the kinds of work that we engage in are consistent with our mission, goals, and values. Since our ultimate goals are to improve governance and reduce poverty, value for money and environmental sustainability are critical to our integrity. Thus, we are committed to using our financial resources wisely and prudently for activities that generate value and impact, as well as being mindful of the environmental impact of our operations.
- **Learning.** We strive to cultivate an environment of learning within IBP to ensure that it is an effective organization. To this end, we document our work and its impact, provide spaces to critically evaluate our efforts, and regularly integrate those lessons into our strategies and operations. We endeavor to understand and document our successes and failures and use both as opportunities to learn about ourselves and our work. This evidence-based approach to learning permeates all that we do.
- **Excellence.** We are committed to professionalism and hard work, and we have a passion for getting the work done and achieving our goals. We hold our work to the highest standards, by drawing on the expertise of our staff, partners, and others, as well as the latest research and good practice in the field. We encourage continuous learning among both our partners and our staff so that they all can develop their knowledge and skills, grow professionally, and excel in their work.
- **Optimism.** We believe that change can happen. We take the problems that we are tackling seriously, but this seriousness does not equal a lack of hope. We believe that we can make a difference in the way that governments operate, and ultimately, in people's lives, by working for budget transparency, participation, and accountability. We believe that there is room to enjoy the relationships that we develop through our work and to approach challenges with a positive attitude. Optimism, joy, and a sense of humor are important creative forces that allow us to continue pushing for change.



Who's Who  
IBP Staff Directory  
December 2018



**Name** Abdulkarim Mohammed

**Position** Country Manager, Ghana

**Team** SPARK

**City / Office** Accra, Ghana

**Joined IBP** November 19, 2018

**Favorite eggs** Well fried (light brown)

**Favorite genre of music** Hilife

**Fun fact** Good at basket weaving



**Name** Abraham Rugo Muriu, PhD

**Position** Country Manager, Kenya

**Team** IBP Kenya / SPARK

**City / Office** Nairobi, Kenya

**Joined IBP** July 2017

**Favorite eggs** Well done

**Favorite genre of music** Contemporary Gospel music and Reggae

**Fun fact** I sew by hand very well.



**Name** Adelei Broers

**Position** Monitoring, Evaluation, and Learning Officer

**Team** SPARK

**City / Office** Washington, DC, USA

**Joined IBP** April 2018

**Favorite eggs** Poached

**Favorite genre of music** Punk

**Fun fact** I'm learning Norwegian!



**Name** Aideen Gilmore

**Position** Senior Program Officer

**Team** Training, Technical Assistance and Networking (TTAN)

**City / Office** Washington, DC, USA

**Joined IBP** February 2016

**Favorite eggs** Straight from the hen

**Favorite genre of music** The 80s: electro, rock or pop I don't care – just the 80s generally

**Fun fact** That I can sing – but I need to have many glasses of wine in me before I can be encouraged to perform!



**Name** Albert van Zyl

**Position** Director: IBP South Africa

**Team** IBP South Africa / SPARK

**City / Office** Cape Town, South Africa

**Joined IBP** August 5, 2005

**Favorite eggs** Scrambled

**Favorite genre of music** Dub

**Fun fact** I teach meditation as a sideline.



**Name** Albertina Meana

**Position** Program Assistant

**Team** Global Initiative for Fiscal Transparency (GIFT)

**City / Office** Washington, DC, USA

**Joined IBP** September 2015

**Favorite eggs** Fried

**Favorite genre of music** Rock

**Fun fact** I play soccer since last winter with a group of “soccer moms”. At the beginning it was challenging as there was no experience in the group but with some weeks of training we started to play decently.



**Name** Alexandre Ciconello

**Position** Senior Program Officer

**Team** Training, Technical Assistance and Networking (TTAN)

**City / Office** Rio de Janeiro, Brazil

**Joined IBP** March 2016

**Favorite eggs** Scrambled

**Favorite genre of music** Brazilian Popular Music (MPB) and pop

**Fun fact** I am a contact and improvisation dancer.



**Name** Anand Mishra

**Position** Director of Communications

**Team** Communications

**City / Office** Washington, DC, USA

**Joined IBP** April 2018

**Favorite eggs** Depends on what accompanies the eggs. Sunnyside up with toast, potatoes; scrambled with cheese, veggies. Eggs Benedict is in my top ten list of favorite dishes.

**Favorite genre of music** Alternative rock/pop/emo

**Fun fact** I competed in and placed in the World Series of Poker.



**Name** Andile Cele

**Position** Programme Officer

**Team** IBP South Africa / SPARK

**City / Office** Cape Town, South Africa

**Joined IBP** Jan 2017

**Favorite eggs** Soft

**Favorite genre of music** alternative RnB

**Fun fact** I can bounce a football (soccer) on one leg for an impressive amount of time.



**Name** Anjali Garg

**Position** Open Budget Survey Supervisor

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** 2013

**Favorite eggs** Poached

**Favorite genre of music** Indie rock

**Fun fact** In 1986ish, I was featured in the Milwaukee Journal as one of the most well-traveled kids in Wisconsin



**Name** Ann Blyberg

**Position** Manager

**Team** Training, Technical Assistance and Networking (TTAN)

**City / Office** Washington, DC, USA

**Joined IBP** July 2015

**Favorite eggs** Scrambled!

**Favorite genre of music** Depends on my mood

**Fun fact** I love birdwatching.



**Name** Ariel Shaker-Brown

**Position** Program Officer

**Team** SPARK

**City / Office** Washington, DC, USA

**Joined IBP** May 2018

**Favorite eggs** As long as they are with cheese, I have no preference

**Favorite genre of music** Blues

**Fun fact** My twin and I are the 4th straight set of identical twins in my family



**Name** Austin Ndiokwelu

**Position** Country Manager for Nigeria

**Team** SPARK

**City / Office** Abuja, Nigeria

**Joined IBP** June 18, 2018

**Favorite eggs** Omelette, spicy, with vegetables

**Favorite genre of music** R&B; gospel; country music

**Fun fact** Consultants and colleagues are usually 'pleasantly surprised' when they hear me sing or hum a song – just because they assumed I only know 'technical issues' ....



**Name** Brendan Halloran

**Position** Head of Strategy and Learning

**Team** Strategy and Learning Team (SALT)

**City / Office** Washington, DC, USA

**Joined IBP** May 2016

**Favorite eggs** in a chocolate brownie mix

**Favorite genre of music** Anything before 2007

**Fun fact** I lived in Guatemala for five years



**Name** Caitlyn Stone

**Position** Development Associate

**Team** Development

**City / Office** Washington, DC, USA

**Joined IBP** November 7, 2018

**Favorite eggs** Scrambled, with cheddar cheese and black pepper

**Favorite genre of music** Indie Rock

**Fun fact** I spent two summers in China taking language courses at Tsinghua University and Beijing Normal University. My favorite place in China is Sichuan province – the food is amazing.



**Name** Carlene van der Westhuizen

**Position** Research Analyst

**Team** IBP South Africa / SPARK

**City / Office** Cape Town, South Africa

**Joined IBP** October 2014 as a consultant and became full-time employee in May 2016

**Favorite eggs** Scrambled

**Favorite genre of music** Pop, rock, classic

**Fun fact**



**Name** Carol Kiangura

**Position** Senior Program Officer

**Team** Training, Technical Assistance and Networking (TTAN)

**City / Office** Washington, DC, USA

**Joined IBP** August 20, 2018

**Favorite eggs** Well done

**Favorite genre of music** R&B

**Fun fact** I have lived in 9 countries.....



**Name** Carrie Ahrens

**Position** Development Officer

**Team** Fundraising

**City / Office** Washington, DC, USA

**Joined IBP** February 2, 2015

**Favorite eggs** Scrambled

**Favorite genre of music** Electronic (chill, house) and Classic Rock (60s, 70s). I have no idea how this is possible.

**Fun fact** I have lived/worked in 9 countries, my favorite being a tie between India and Italy.



**Name** Catherine Casey

**Position** Director of Development

**Team** Development

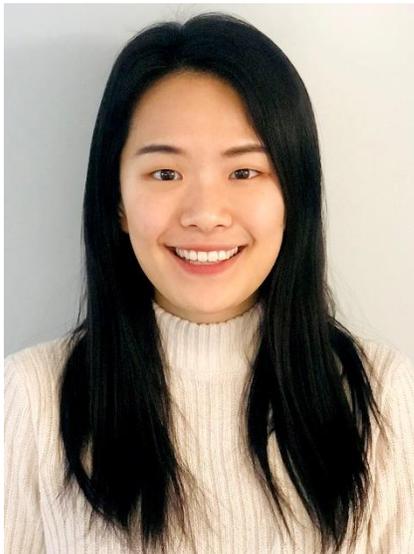
**City / Office** Garden City, NY, USA

**Joined IBP** November 2017

**Favorite eggs** Poached and running over everything underneath when the yolk is broken

**Favorite genre of music** Rock (I was born in the sixties, what else could it be??)

**Fun fact** I have a thing for silent movies



**Name** Chloe Cho

**Position** Research Analyst

**Team** Budget Credibility / Research / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** August 1, 2018

**Favorite eggs** Poached or scrambled

**Favorite genre of music** Indie pop/rock

**Fun fact** ...not sure, I guess being quoted in a NYT article was a work achievement...?



**Name** Claire Schouten  
**Position** Senior Program Officer  
**Team** International Advocacy / Policy Team  
**City / Office** Toronto, Canada  
**Joined IBP** February 2015  
**Favorite eggs** Scrambled  
**Favorite genre of music** No favorite - tend to listen to upbeat music  
**Fun fact** I have lived in the Democratic Republic of Congo and worked in conflict-affected countries for many years.



**Name** Claudio Silva  
**Position** Chief Financial Officer  
**Team** Finance  
**City / Office** Washington, DC, USA  
**Joined IBP** 2012  
**Favorite eggs** Scrambled  
**Favorite genre of music** Alt. Rock  
**Fun fact** One of my pictures is the current cover of the official brochure for the Catoclin Mountain National Park.



**Name** David Jenkins

**Position** Human Resources Generalist

**Team** Human Resources / Operations

**City / Office** Washington, DC, USA

**Joined IBP** December 12, 2017

**Favorite eggs** Scrambled

**Favorite genre of music** Like all kinds, but especially pop divas

**Fun fact** I once outraced a tornado (in an Acura Integra) while driving across Texas.



**Name** David Robins

**Position** Program Officer, Anglophone Africa

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** August 2013

**Favorite eggs** Migas, with cheese inside a warm handmade tortilla

**Favorite genre of music** Post-core emo bands from the early 2000s

**Fun fact** Greece once held me in medical quarantine for seven days, which really messed up my family vacation.



**Name** Debby Friedman

**Position** Senior Communications Officer

**Team** Communications

**City / Office** Washington, DC

**Joined IBP** November 26, 2018 (but my first contract with IBP was for a bit of work on the OBS 2010)

**Favorite eggs** Poached

**Favorite genre of music** Classic folk rock...but I like all kinds of music

**Fun fact** In my younger days I was a flamenco dancer.



**Name** Delaine McCullough

**Position** Manager

**Team** Climate Finance Accountability

**City / Office** Washington, DC, USA

**Joined IBP** 2008

**Favorite eggs** Shakshuka

**Favorite genre of music** Depends on too many factors to list

**Fun fact** My senior year of high school, I won the Scholar Athlete award (with trophy) for the year. Sadly, this didn't mean I was the best scholar or athlete, I just had the highest grades among all the schools athletes. Kinda like being the best cricket player in



**Name** Elena Mondo

**Position** Senior Technical Advisor

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** August 27, 2007

**Favorite eggs** Poached

**Favorite genre of music** That's an impossible question! I'll go for the 80s, Indie Rock and Classical

**Fun fact** I hold an MA in History of Art, with thesis on the Franciscan basilica of Assisi.



**Name** Gloria Walker

**Position** Senior Accounting and Finance Officer

**Team** Finance

**City / Office** Washington, DC, USA

**Joined IBP** November 1, 2017

**Favorite eggs** Sunny side up

**Favorite genre of music** Hip hop, early aughts rock

**Fun fact** I've seen Beyonce in every single one of her tours since 2007



**Name** Guillermo Herrera

**Position** Project Coordinator

**Team** Budget Credibility / Research / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** June 2018

**Favorite eggs** Scrambled

**Favorite genre of music** Indie rock/pop

**Fun fact** I played the flute with a professional orchestra in high school.



**Name** Indira Khurana

**Position** Country Manager, India

**Team** SPARK

**City / Office** New Delhi, India

**Joined IBP** May 2018

**Favorite eggs** Omlette

**Favorite genre of music** Bollywood

**Fun fact** I can write limericks!



**Name** Jason Lakin

**Position** Head of Research

**Team** Research / Policy Team

**City / Office** Cleveland, OH, USA

**Joined IBP** 2009

**Favorite eggs** Huevos Rancheros

**Favorite genre of music** Classical

**Fun fact** I spent one night sleeping in a stranger's shack in Kibera, the largest slum in Nairobi, by accident.



**Name** Jennie Grant

**Position** Director of Partnership Development

**Team** SPARK & BTF

**City / Office** Brighton, UK

**Joined IBP** June 2017

**Favorite eggs** With Chilli and tortillas

**Favorite genre of music** Funk (anything with a good bass)

**Fun fact** I lead a team in Guatemala that successfully reunited an abducted child (during the war) with his mayan family 25 years later. The search involved a puncture in the jungle, being rescued by a priest on a motorbike, an abandoned mansion in the mangroves oc



**Name** Jessica (Jess) Taylor

**Position** Deputy Country Manager

**Team** IBP South Africa / SPARK

**City / Office** Cape Town, South Africa

**Joined IBP** March 1, 2014

**Favorite eggs** Medium poached

**Favorite genre of music** Pop

**Fun fact** I have a strange weakness for Hello Kitty (don't ask) and I am crazy about yoga (I once did 45 yoga classes in 30 days!)



**Name** Joel Friedman

**Position** Senior Fellow

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** 2000 (thru 2006) and then again in 2012

**Favorite eggs** Scrambled or poached

**Favorite genre of music** Bebop

**Fun fact** Drove a forklift for my first job out of college.



**Name** John Kinuthia

**Position** Lead Research Analyst

**Team** IBP Kenya / SPARK

**City / Office** Nairobi, Kenya

**Joined IBP** Sometime late 2012,early 2013. Its complicated

**Favorite eggs** Scrambled with Kachumbari

**Favorite genre of music** Reggae and Country

**Fun fact** I was a member of the church choir all through high school. My serious Bass 1 and Tenor also had me join the School choir and we made it to the National School Festival for four straight years (That is the big league in Kenyan schooling system)

**Name** John Shisoka Ngoka

**Position** Office Support Officer

**Team** IBP Kenya / SPARK

**City / Office** Nairobi, Kenya

**Joined IBP** 2016

**Favorite eggs** Eggs is like a world generation carried together.

**Favorite genre of music** Gospel songs

**Fun fact** The work achievement I am proud of is IBP trying to reach out to poor and marginalized areas.



Name	Jostne Wambui
Position	Operations Intern
Team	IBP Kenya / SPARK
City / Office	Nairobi, Kenya
Joined IBP	
Favorite eggs	
Favorite genre of music	
Fun fact	

	<b>Name</b> Juan Pablo Guerrero
	<b>Position</b> Network Director
	<b>Team</b> Global Initiative for Fiscal Transparency (GIFT)
	<b>City / Office</b> Washington, DC, USA
	<b>Joined IBP</b> 2014
	<b>Favorite eggs</b> Benedictine
	<b>Favorite genre of music</b> Classical
	<b>Fun fact</b> I am always in love



Name	Kipkorir Pbartuiyot Biegon
Position	Research Intern
Team	IBP Kenya / SPARK
City / Office	Nairobi, Kenya
Joined IBP	November 1, 2018
Favorite eggs	Not so much, I don't eat often.
Favorite genre of music	Country Music
Fun fact	I love being me



Name	María José (Cote) Eva
Position	Program Officer, Latin-American and the Caribbean
Team	Open Budget Initiative / Policy Team
City / Office	Washington, DC, USA
Joined IBP	May 2016 (consultant), October 2016 (staff)
Favorite eggs	Scrambled
Favorite genre of music	Not heavy metal
Fun fact	Not sure what to respond



**Name** Marianne Klinker

**Position** Program Officer, Content Development and Digital Strategy

**Team** Communications

**City / Office** Washington, DC, USA

**Joined IBP** September 1, 2015

**Favorite eggs** Fried

**Favorite genre of music** Alternative

**Fun fact** I am co-captain of Washington, D.C.'s internationally ranked women's roller derby team, the DC Rollergirls All Stars. I used to be a radio traffic reporter and part-time DJ.



**Name** Marilyn Butler

**Position** Operations & Office Administrator

**Team** Operations

**City / Office** Washington, DC, USA

**Joined IBP** 2009

**Favorite eggs** Over Easy

**Favorite genre of music** Gospel/R&B

**Fun fact** I am a great dancer



Name	Michael Parks
Position	Operations Assistant
Team	Operations
City / Office	Washington, DC, USA
Joined IBP	December 2018
Favorite eggs	
Favorite genre of music	
Fun fact	

Name	Michael Petty
Position	Intern
Team	Finance
City / Office	Washington, DC, USA
Joined IBP	June, 2018
Favorite eggs	Scrambled with cheese
Favorite genre of music	R&B
Fun fact	I like to play card games.



**Name** Mokeira Nyagaka

**Position** Research Analyst and Trainer

**Team** IBP Kenya / SPARK

**City / Office** Nairobi, Kenya

**Joined IBP** 2014 (volunteer), 2015 (consultant) and 2016 (employee)

**Favorite eggs** Pouched

**Favorite genre of music** Classical (choral)

**Fun fact** I have never drunk alcohol, coffee or tea.



**Name** Nantika Ghafur

**Position** Program Administrator

**Team** SPARK / Operations

**City / Office** Washington, DC, USA

**Joined IBP** 2011

**Favorite eggs** Soft boiled egg

**Favorite genre of music** Pop & Electronic

**Fun fact** I am attending classes of floral design.



**Name** Nusrat (Nus) Ahmad  
**Position** Senior Operations Officer  
**Team** Operations  
**City / Office** Washington, DC, USA  
**Joined IBP** April 25, 2011  
**Favorite eggs** Boiled  
**Favorite genre of music** Everything but rap & electronic  
**Fun fact** I still watch cartoons



**Name** Olivia Andrews  
**Position** Operations Manager  
**Team** IBP South Africa / SPARK  
**City / Office** Cape Town, South Africa  
**Joined IBP** November 1, 2017  
**Favorite eggs** Free range and organic  
**Favorite genre of music** Chill house  
**Fun fact** I was in the Guinness Book of World Records!



**Name** Paolo de Renzio

**Position** Senior Research Fellow

**Team** Research & Open Budget Initiative / Policy Team

**City / Office** Rio de Janeiro, Brazil

**Joined IBP** October 2010

**Favorite eggs** Scrambled

**Favorite genre of music** Jazz

**Fun fact** I've played trombone in Carnival street bands in Rio



**Name** Rose Nierras

**Position** Director of Country Strategies

**Team** SPARK

**City / Office** Washington, DC, USA

**Joined IBP** 2010

**Favorite eggs** ?

**Favorite genre of music** Depends on the weather

**Fun fact** I am a letterhead (ie, I appreciate nice letters and I do try and write cool letters). I am connected to the community of letterheads here in DC (yes, there is one).



**Name** Sally Torbert

**Position** Program Officer, Asia

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** August 1, 2017

**Favorite eggs** Omelets

**Favorite genre of music** Depends on the weather

**Fun fact** I regularly confuse left and right. As in, I'm terrible at giving directions.



**Name** Suad Hasan

**Position** Program Associate

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** May 1, 2016

**Favorite eggs** Sunny side up, yolk fully cooked.

**Favorite genre of music** Folk & indie pop

**Fun fact** I love editing videos, edited some for OBS in the past, created 2 music videos documenting my son's first two years!



**Name** Suvarna Hulawale

**Position** Monitoring, Evaluation, and Learning Officer

**Team** Strategy and Learning Team (SALT)

**City / Office** Washington, DC, USA

**Joined IBP** Nov. 20., 2014 (Long time)

**Favorite eggs** Boiled

**Favorite genre of music** Depends on day

**Fun fact** My favourite thing in childhood was taking care of buffalos.



**Name** Sylvester McIntosh

**Position** Senior Accountant

**Team** Finance

**City / Office** Washington, DC, USA

**Joined IBP** August 2014

**Favorite eggs** Scrambled with cheese

**Favorite genre of music** Hip Hop

**Fun fact** None noted



**Name** Tom Zanol

**Position** Senior Operations Officer

**Team** Operations

**City / Office** Washington, DC, USA

**Joined IBP** 2004 (and at CBPP since 2001)

**Favorite eggs** Over easy

**Favorite genre of music** The good kind

**Fun fact** Was once assistant manager of a record store (when those still existed). Became a huge fan of the rock band 'Guided by Voices' and have been to about 60 of their shows across the USA over 20+ years.



**Name** Tonika R. Jackson

**Position** Payroll/AP Specialist

**Team** Finance

**City / Office** Washington, DC, USA

**Joined IBP** January 2, 2018

**Favorite eggs** Scrambled

**Favorite genre of music** I have not favorite I listen to all genres except heavy metal

**Fun fact** I like to make people laugh.



**Name** Trish Viecco Carrillo

**Position** Events Coordinator

**Team** Operations

**City / Office** Washington, DC, USA

**Joined IBP** Aug 2011

**Favorite eggs** Over medium or scrambled with scallions and tomatoes or hard-boiled with s & p. I love eggs.

**Favorite genre of music**

**Fun fact** I'm left-handed



**Name** Virginia Stettinius McMullan

**Position** Director of Operations

**Team** Finance and Operations Group (FOG),  
Institutional Strengthening Initiative

**City / Office** Washington, DC, USA

**Joined IBP** September 1, 2015

**Favorite eggs** Scrambled

**Favorite genre of music** 80s music – the poppier, the better

**Fun fact** I was in a bell choir group in college. However, I skipped senior year because it got political within the group. Go figure!



**Name** Vivek Ramkumar

**Position** Senior Director of Policy

**Team** Open Budget Initiative / Policy Team

**City / Office** Washington, DC, USA

**Joined IBP** January 2005

**Favorite eggs** Alive (What else can you expect from a vegetarian?)

**Favorite genre of music** Rock

**Fun fact** Won a prize for my chocolate cake at a county fair.



**Name** Vivian Ntinyari

**Position** Operations Officer

**Team** IBP Kenya / SPARK

**City / Office** Nairobi, Kenya

**Joined IBP** March 10, 2016

**Favorite eggs** Sunny side up

**Favorite genre of music** Dubstep

**Fun fact** I am an open book :)



Name **Warren Krafchik**

Position **Executive Director**

Team **Homeless**

City / Office **Washington, DC, USA**

Joined IBP **2001**

Favorite eggs **Peeled**

Favorite genre  
of music **Jùjú music**

Fun fact **I am brilliant at flower arranging.**