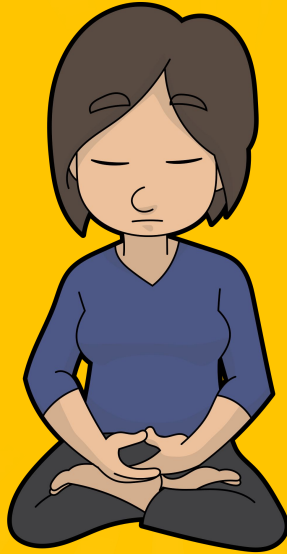


**LOCAL BUDGET TIMELINE +
BUDGET ADVOCACY
PRIMER**

Catalyst California



BUDGET TIMELINE CHECK-IN



Deep Breath

Reminder:

Engage in the annual budget process only if it makes sense for your campaign and community capacity-building efforts.

Pro Tip:

Develop a multi-year budget advocacy campaign plan, that way you are STRATEGIC and not burning out year-to-year.



General Budget Timeline

October - December

January

February-March

April - May

June - August

City Manager/
CEO releases
budget guidelines
to Departments.

Revenue projections
will largely
determine what
funding is available
for new priorities.

Departments
have developed
and will submit
their budget
proposals.

Governor releases
proposed budget,
often with impacts
on County budgets.

City Manager/
CEO finalize
proposed
budget.

The recommended
budget is released,
and public
hearings take
place.

State May Revise,
latest information on
revenue projections.

Final budget
deliberations and
approval (June
30th)

Budget finalized
often in August and
uploaded online.

General Budget ADVOCACY Timeline

October - December
**Proposed Budget
Preparation**

**Member engagement,
champion and decision
makers**

Budget research and
identifying demands

Determine advocacy
strategies (including
media)

January - March
**Proposed Budget
is Being Finalized**

**Finalize and refine
your demands based
on feedback
received**

**Continue to meet
with champions and
decision-makers**

April - June
**Proposed Budget
is Released**

**Continue to meet with
inside champions**

**Analyze recommended
budget and finalize
demands**

**Review recommended
budget, have community
meetings, forums,
demonstrations, editorials**

May - June
**Budget Hearings
and Passage**

**Turnout, mobilize,
public comment,
media**

**Final push,
turnout**

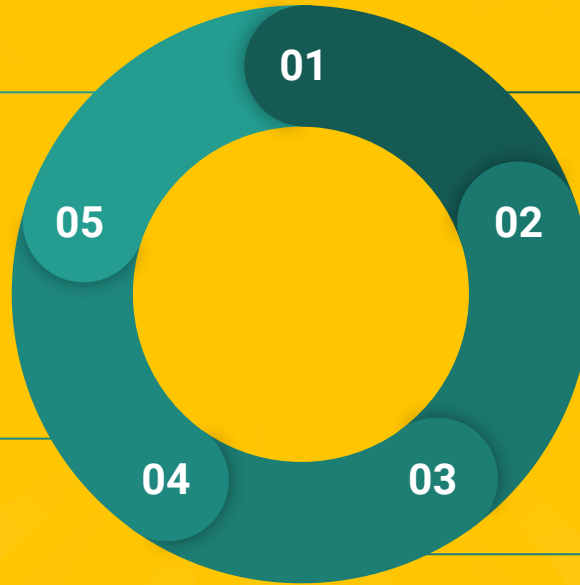
Planning for a Budget Advocacy Campaign

Launch Campaign!

Begin stakeholder outreach and refine demands as you begin to get more feedback. You may have to go back to previous steps, that's OK, but you have all the components necessary to get started.

Develop Demands + Campaign Plan

Once you've spent time learning and training members on the budget, begin developing your campaign plan and timeline. You may find that accomplishing your campaign demand is a multi-year effort, and that's OK!



Conduct a Community Needs Assessment

Understand your community members needs and explore what change they'd like to see made.

Conduct a Power Analysis

Understand who holds power on the issue, who you need to move, and where you stand in relation to decision-makers.

Invest in Capacity-Building

If you are new to budget advocacy, this is a time to invest in understanding the budget process for your members and yourself, and learn how much is invested in the issue you care about.

Guidance on Developing Budget Demands/Asks

1. **IDENTIFY A CLEAR GOAL.** *Examples include:*

- a. Establish a community safety department that will house the alternative crisis response effort and oversee reentry service programs.
- b. Invest in park maintenance and repairs for highest need parks in my city.
- c. Invest in building a new park or community center.
- d. Invest cannabis revenues for youth and system-impacted individuals.

NOTE: Multi-issue campaigns (like People's Budgets) can operate simultaneously but they will require a lot of cross-coalition communication and management. **On the flip side, it will demonstrate unity and increase the amount of community power.**

It's OK to provide a ballpark estimate for what your demand/ask will cost. The cost of need is always going to be really high, but it's OK to start with a more reasonable estimate based on political environment.

Guidance on Developing Budget Demands/Asks

2. DETERMINE HOW PUBLIC FINANCE ARE RELATED TO THIS CAMPAIGN

Lack of ongoing resources for programs or projects



Identify new funding stream or increase current funding by X amount and ensure funds are spent.

Need for resources to be spent equitably



There is a funding stream (cannabis, general revenues, certain special revenues) but they are not being spent equitably.

Need for the creation of a specific program, staffing, or infrastructure



Need to identify how this new structure would work and where potential funding could come from.

Guidance on Developing Budget Demands/Asks

3. DETERMINE WHAT BUDGET RESEARCH WOULD SUPPORT YOUR CAMPAIGN EFFORTS.

- A **historical budget analysis** tells the story of a decade of underinvestment in communities.
- An **analysis of what is being spent on specific programs**, and how much more spending would need to increase to make a significant improvement.
- Identifying **strategies for spending funds equitably** to ensure highest need communities get the investment they need to thrive.

NOTE: Budget research is tedious and takes time, starting research early in the capacity-building and campaign planning process is crucial towards setting your campaign up for success.

Guidance on Developing Budget Demands/Asks

4. DETERMINE HOW MUCH FUNDING YOUR CAMPAIGN REQUIRES

- **PROGRAM/DEPARTMENT COSTS** - Programs/departments are mostly staffed by people, knowing how many more people you want hired and their average salary and benefits costs would allow you to add up total campaign ask. Materials and other tangential costs are incurred but they are usually much smaller than hiring individuals.
- **CAPITAL PROJECT COSTS** - Having a capital needs assessment conducted would be super helpful towards understanding the scale and cost of the need. Consulting firms can be hired by the jurisdiction to conduct a capital needs assessment with community input. This will allow for a more specific and research informed ask. Your campaign can include this needs assessment as part of the overall demand/goal.

Guidance on Developing Budget Demands/Asks

4. DETERMINE HOW MUCH FUNDING YOUR CAMPAIGN REQUIRES

(continued...)

PRO TIP: Research the cost of past projects or similar programs to estimate the total budget request. Nearby jurisdictions may have a similar program, and contacting that jurisdiction/department and asking for these details may help speed up your research.

- **Public databases** like [State Controller's Government Compensation in California website](#) allows you to get the most up-to-date costs of government employee salaries and benefit costs.
- [Review other jurisdictions reports of capital needs assessments](#) to see what they evaluate, and what you'd want your needs assessment analysis to include.
- Many jurisdictions also provide a **capital improvement project list** that detail the costs of specific improvements, you can use that list to get ballpark estimates for costs.

Guidance on Developing Budget Demands/Asks

5. What is the STORY you need to tell?

- **WHO IS IMPACTED?** - Demographic Info- what you already know + what else do you need to know about the communities we're centering in this fight?
- **WHY IS THIS IMPORTANT?** - How could these budget demands change the conditions our people are living in? How will the entire city/ region/ state benefit from this?
- **No, Really, who's impacted and do they care?** - Align on a powerful, compelling Narrative + Story Collection + Spokespeople training

PRO TIP: You could go into a DEEP rabbit hole with Demographic Analysis. At a minimum, gather what you do know and do some basic searches on available research.

Budget Advocacy Grounding



Deep Breath

Budget Advocacy Grounding

The problems we are trying to solve via budget advocacy are complex and took generations to develop into their current form (size of law enforcement!)

It will take time for us to transform government bodies into ones that care for our communities, and cannot be fixed in one budget cycle.

The annual budget process only provides for incremental line-item changes, meaning changes around the margins. Budget advocacy is a way to disrupt that incrementalism if we plan for structural changes to the budget development process **AND** creating new care-based structures.

Most of our requests still rely on government to be the entity to effectuate that change we seek. This means that **WE HAVE TO THINK ABOUT THE PEOPLE WHO ARE IN ADMINISTRATIVE POSITIONS** as additional influence targets in our campaign.