

# GENDER RESPONSIVE BUDGETING IN PRACTICE: A TRAINING MANUAL





UNFPA, the United Nations Population Fund, is an international development agency that promotes the right of every woman, man and child to enjoy a life of health and equal opportunity. UNFPA supports countries in using population data for policies and programmes to reduce poverty and to ensure that every pregnancy is wanted, every birth is safe, every young person is free of HIV/AIDS, and every girl and woman is treated with dignity and respect.

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UNIFEM is the women's fund at the United Nations. It provides financial and technical assistance to innovative programmes and strategies that promote women's human rights, political participation and economic security. UNIFEM works in partnership with UN organisations, governments and nongovernmental organisations (NGOs) and networks to promote gender equality. It links women's issues and concerns to national, regional and global agendas by fostering collaboration and providing technical expertise on gender mainstreaming and women's empowerment strategies.

UNIFEM has supported initiatives on gender responsive budgeting in over 20 countries. This support facilitated a growing momentum among governments, civil society and parliamentarians to engage in budget policy-making at national and local levels from a gender perspective.

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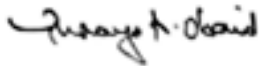
## FOREWORD

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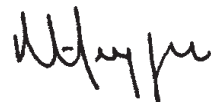
**W**e are very pleased to introduce the UNFPA/UNIFEM training manual “Gender Responsive Budgeting in Practice,” and the resource pack, “Gender Responsive Budgeting and Women’s Reproductive Rights.” We feel certain that these two publications will add value to the available wealth of training resources and help you to build expert teams to meet the growing demand at country level. The goal is to encourage a gender perspective in the national planning and budgeting processes.

Gender responsive budgeting helps to track the way that budgets respond to women’s priorities and the way that governments use funds to reduce poverty, promote gender equality, reverse the spread of HIV and lower the rates of maternal and child mortality. It helps ensure government accountability to the commitments made to women in the Cairo Programme of Action on Population and Development and the Beijing Platform for Action for Gender Equality and Women’s Empowerment and to achieving the Millennium Development Goals.

Today, more than ten years after the Cairo Programme of Action and the Beijing Platform for Action, we can see significant progress in the areas of women’s empowerment, gender equality and women’s reproductive rights and health. Yet much more remains to be done. We trust that, in your hands, you shall find the tools to help take us further along the road towards even greater progress.



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## ACKNOWLEDGEMENTS

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# MANUAL DESCRIPTION

## BACKGROUND

In 2005, UNFPA and UNIFEM concluded an agreement under UNFPA's strategic partnership program (SPP) with United Nations partners. The UNFPA/UNIFEM partnership program identified Gender Responsive Budgeting as an area for cooperation. The aim of this partnership is to build internal capacity in UNFPA through its country support teams (CSTs) and country offices and in UNIFEM through its regional programs. It is also envisioned that this partnership will strengthen joint initiatives on Gender Responsive Budgeting. In addition, it will offer more coherent and effective support to program countries and to UNCTs in applying this tool to make progress on gender equality commitments.

Under this partnership, UNIFEM undertook to develop knowledge products on gender responsive budgeting and reproductive health. The process for identifying the components of these knowledge products was a participatory one that drew on existing expertise within the staffs of UNFPA and UNIFEM. This process entailed a desk review of UNFPA and UNIFEM programs, an electronic discussion in late 2005, and two workshops held in Cape Town and Bangkok in April and June 2006 with UNFPA and UNIFEM staff. The outputs of this partnership include the present training manual and a resource pack entitled, "Budgeting for Reproductive Rights: Using gender responsive budgeting."

## PURPOSE AND OBJECTIVES

The training manual on gender responsive budgeting (GRB) is intended to build the capacity of UNFPA and UNIFEM staff in applying gender budget analysis tools in their programming around gender equality and women's rights, it will also assist them in supporting gender budget initiatives wherever they exist. The manual specifically seeks to build understanding of GRB as a tool for promoting gender equity, accountability to women's rights as well as efficiency and transparency in budget policies and processes.

It is anticipated that this manual will develop skills required to effectively engage in mainstreaming gender in planning and budgeting processes at country level. It is also foreseen that UNFPA and UNIFEM will be using the manual to build teams of experts that can support the growing demand from national partners for capacity building in GRB.

The training manual adds value to the wealth of training resources on GRB firstly through a focus on the applicability of gender responsive budgeting to reproductive health and secondly through a presentation of sector-specific examples and case studies dealing with maternal health, gender and HIV/AIDS, and violence against women.

The manual draws on the rich experience and lessons learnt from UNIFEM's programming on gender budgeting in more than thirty countries since early 2000. It further encapsulates the understanding that gender responsive budgeting is an essential element in any serious political commitment towards gender equality and lays out approaches to align budgets with requirements for the achievement of women's rights.

# MANUAL DESCRIPTION

## CONTENT OF THE MANUAL

The manual consists of five training modules, each divided into two to four sessions. It is intended for use in a workshop setting.

The five training modules provide a comprehensive overview of entry points for gender responsive budgeting within national budget cycles. Thus, the manual should continuously be related to the planning and budgeting processes at the national level.

The manual seeks to offer clarity and understanding of the conceptual, technical and political elements of gender responsive budgeting:

- The first module, “Gender budgeting: concepts, principles and purposes,” covers the conceptual elements of gender responsive budgeting in relation to gender mainstreaming and women’s rights.
- The second module, “Budget formats and processes,” unpacks the technical and political aspects with reference to budgets and policy making cycles.
- The third module, “Tools for Gender budget analysis,” introduces a range of useful tools for analyzing budgets from a gender perspective, with a special focus on those that are most commonly used.
- The fourth and fifth modules present concrete applications of gender budget analysis tools and approaches used by gender budget initiatives to advocate for the incorporation of a gender responsive perspective based on the results of the budget analysis. Specifically, module five, “Gender budget initiatives from within government,” focuses on government-led gender budget initiatives.
- The final session of the training manual, entitled “Supporting GRB work,” is a hands-on exercise that allows participants to apply the skills and knowledge developed during the training through the drafting of gender responsive programs in relation to specific issues.

## COMPLEMENTARY RESOURCES

The manual should be used in conjunction with:

- The “Budgeting for Reproductive Rights” resource pack, which was also developed under the strategic partnership between UNFPA and UNIFEM
- The CD-ROM of handouts and annexes
- Key reading materials on gender responsive budgeting available on the website [www.gender-budgets.org](http://www.gender-budgets.org) (see list in Annexes)

# MANUAL DESCRIPTION

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## WORKSHOP DURATION

The workshop is designed to be carried out over a period of three days. An example of a workshop program, which can be adapted to suit participants' profiles and availability, is provided in the annexes.

## INTENDED AUDIENCE

The training manual is targeted at staff of UNFPA and UNIFEM and their partners from governmental and non-governmental organizations as a way to support the institutionalization of GRB work at country level. Other UN agencies may also find it useful. The recommended characteristics of workshop participants include:

- Interest and commitment in incorporating gender responsive budgeting concepts into policy advocacy and programming for gender equality
- Analytical skills in relation to gender inequality
- Experience in supporting national planning and programming processes in relation to women's rights and reproductive rights

## WORKSHOP FACILITATION

Workshop facilitators should ideally have:

- Extensive experience using gender responsive budgeting concepts and tools
- Familiarity with a number of gender budget initiatives around the world
- Proficiency in gender and economics issues
- Advanced capacity for gender analysis
- Strategic planning and program formulation skills
- Experience in applying adult learning methodologies and workshop facilitation skills

It may be useful to bring in other resource persons for specific sessions.



### TRAINING METHODOLOGY

Workshops should begin with a preliminary exercise aimed at demonstrating that gender budgeting is a process combining gender analysis with decision making around budgets, and that policy making processes largely define the outcomes of these policies. This exercise is then used to lay out the framework of the training manual in a brief presentation of the “workshop road-map.”

Each of the five modules includes at least one PowerPoint presentation followed by hands-on activities and/or case studies. Samples of PowerPoint presentations are provided in the annexes for facilitators’ use or adaptation as appropriate.

Copies of the relevant presentation and handouts (available on the CD-ROM) should be distributed to participants at the beginning of each session. At the end of each session, key points will be summarized and recorded on flip charts. Where activities are scheduled, the facilitator will explain the process and organize the working groups, ensuring that group composition always varies so that all participants get to interact at least once during the workshop.

Throughout the workshop, the facilitator or team of facilitators should ensure that the delivery process is participatory. Principles of adult education need to be applied including making use of participants’ experiences and insights whenever possible. The workshop’s success depends on the presence of participants with experiences in gender responsive budgeting—either government representatives, members of civil society or GRB experts. Where possible, two participants with specific experience in implementing gender budget initiatives will make presentations during the second session of module 4.

### EVALUATION

At the end of the workshop, participants should be required to fill out an evaluation form, targeting both the process and content of the workshop (see annexes for a sample evaluation form).

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## **Introductory Session**

### **Module 1: Gender budgeting: concepts, principles and purposes**

Session 1: GRB concepts and principles

Session 2: GRB Processes: Planning and policy transformation

### **Module 2: Budget formats and processes**

Session 1: What is a budget?

Session 2: Budget process exercise

### **Module 3: Tools for gender budget analysis**

Session 1: Elson's budget analysis tools

Session 2: Costing tools: MDG costing

Session 3: Case studies of non-government costing

Session 4: Addressing data requirements for gender budget analysis

### **Module 4: Experiences of gender budget initiatives (GBIs)**

Session 1: Experiences of gender budget initiatives

Session 2: Case studies

### **Module 5: Gender budget initiatives from within government**

Session 1: Gender budget statements

Session 2: Call circulars

### **Closing Session: Supporting GRB work**

## INTRODUCTORY SESSION

<b>OBJECTIVES</b>	<ul style="list-style-type: none"><li>• Encourage participants to interact</li><li>• Build consensus on workshop objectives and expectations</li><li>• Encourage participants to relate GRB to their personal experiences and understand its relevance to promoting gender equality.</li></ul>
<b>CONTENT</b>	<ul style="list-style-type: none"><li>• Workshop objectives</li><li>• Participants' introductions</li><li>• Manual Road Map—Set up the framework of the workshop program</li></ul>
<b>HANDOUT</b>	Workshop Program—Copy of Training manual
<b>FORMAT</b>	Open circle discussion and exercise followed by PowerPoint presentation
<b>SESSION OUTLINE</b>	Opening statement/Welcome address Review of workshop objectives: 15 minutes Participants' introductions: 60 minutes Exercise: 60 minutes Presentation of workshop road map and program: 15 minutes <b>Total: 150 minutes</b>

# INTRODUCTORY SESSION

## EXERCISE: NEGOTIATING A HOUSEHOLD BUDGET

### SESSION GUIDELINES

Time: 60 minutes

10 minutes to explain process, read household profiles and form groups

20 minutes for group work

15 minutes to report back

15 minutes for facilitator to offer clarifications

### MATERIALS NEEDED

Flipcharts, markers, copies of two basic household budgets, copies of instructions for each family and family members

### INSTRUCTIONS

Divide participants into two groups: one representing a poor rural household and the other one an urban middle class household, each faced with a specific set of issues. Assign a role to each member of the group. The task for each group is to develop a budget by identifying specific budget items and amounts that will be spent for each of them. The decisions are made based on negotiations amongst the members of each household.

At the end of the allocated time, invite participants to report back. After they present their budget, the facilitator should pose the following questions:

- How were the decisions made and by whom?
- Who benefited the most from the budget and whose needs were most disregarded?
- Which budget items were prioritized and which were left out?
- Were the decisions made gender responsive?
- Could one change the allocation of funds to better respond to everyone's needs?
- Are there parallels between this exercise and the government budgeting process?
- How does government spending affect household income and spending on services such as health, water, etc?

### ADAPTATION

Facilitator can adapt the suggested family profiles as necessary.

# MODULE 1

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## **GENDER BUDGETING: CONCEPTS, PRINCIPLES AND PROCESSES**

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## SESSION 1: GRB CONCEPTS AND PRINCIPLES

<b>OBJECTIVES</b>	<ul style="list-style-type: none"> <li>• To create a common understanding of the GRB approach</li> <li>• To articulate the relevance of unpaid care work to budgets</li> </ul>
<b>CONTENT</b>	<ul style="list-style-type: none"> <li>• GRB concepts and principles</li> <li>• GRB: definition and background</li> <li>• GRB and unpaid care work</li> <li>• GRB: a rights perspective</li> <li>• GRB and gender mainstreaming</li> </ul>
<b>HANDOUT</b>	<p>“Fact Sheet: Government Accountability to Human Rights through Budgets,” UNIFEM, 2005</p>
<b>RESOURCE PACK REFERENCE</b>	<ul style="list-style-type: none"> <li>• Defining GRB</li> <li>• Budget work and gender equality and equity</li> <li>• GRB, reproductive health and unpaid care work</li> </ul>
<b>FORMAT</b>	<p>PowerPoint presentation or handout followed by discussion</p>
<b>SESSION OUTLINE</b>	<p>Introduction: 5 minutes            Presentation: 15 minutes            Discussions/Q&amp;A: 20 minutes            Conclusion: 5 minutes  <b>Total: 45 minutes</b></p>

# SESSION 1: GRB CONCEPTS AND PRINCIPLES

## SESSION GUIDELINES

### PRIOR TO THE SESSION

Review relevant section of the resource pack.

Prepare PowerPoint presentation or handout based on suggested key messages.

Prepare flipchart with the objective(s) of the session and hang on wall throughout the session for reference.

### INTRODUCTION

Read out loud the objectives of the session.

Indicate at which stage of the road map the session stands.

Describe the process of the session.

### KEY MESSAGES

- The budget is the single most important policy tool of government as it affects the successful implementation of all other policies.
- Gender responsive budgets are not separate budgets for women or men.
- A gender responsive budget ensures that the needs and interests of individuals from different social groups (sex, age, race, ethnicity, location) are addressed in expenditure and revenue policies.
- GRB uses various tools, approaches and strategies to monitor outcomes, outputs, activities and inputs of budgets with a gender perspective.
- CEDAW does not contain a specific provision on budgets, but the CEDAW Committee has often raised questions regarding governments' budgets.
- Gender mainstreaming is a strategy adopted in Beijing as the primary tool for promoting gender equality worldwide.
- What are the requirements for successful gender mainstreaming?
- Can GRB be a tool for gender mainstreaming?
- What does it take for gender equality advocates to influence the mainstream?

### CONCLUSION

Invite questions/discussions and offer necessary clarifications.

Refer back to the objectives of the session and check in with participants to ensure that the stated objectives are met.

Wrap up and make a transition to the next session



## SESSION 2: GRB PROCESSES: PLANNING AND POLICY TRANSFORMATION

<b>OBJECTIVES</b>	<p>By the end of this session, participants are expected to:</p> <ul style="list-style-type: none"> <li>• Articulate linkages between policy making, programming and budgeting and the added value of gender responsive budgeting approaches to policy outcomes.</li> <li>• Understand opportunities provided by performance-based budgeting as an approach that builds the links between planning, budgeting and results.</li> </ul>
<b>CONTENT</b>	<ul style="list-style-type: none"> <li>• The five-step approach to GRB</li> <li>• A country example of a GRB initiative that linked gender planning to programming, budgeting and auditing</li> <li>• Performance based budgeting: a budgeting approach with gender responsive potential</li> </ul>
<b>HANDOUT</b>	Refer to CD-ROM for related readings
<b>RESOURCE PACK REFERENCE</b>	<p>Page 52: Budget formulation</p> <p>Page 60: Mexican guide to formulating health sector budgets</p>
<b>FORMAT</b>	PowerPoint presentation
<b>SESSION OUTLINE</b>	<p>Presentation: 20 minutes</p> <p>Discussions: 20 minutes</p> <p>Conclusion: 5 minutes</p> <p><b>Total: 45 minutes</b></p>

## SESSION 2: GRB PROCESSES: PLANNING AND POLICY TRANSFORMATION

### SESSION GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and post on the wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Description of common GRB activities: research, advocacy, monitoring, training, awareness-raising, policy analysis and design
- The five-step approach to GRB
- What are the benefits of GRB work for government?
- Concrete example: the Mexican guide for budget formation in health sector is provided in Annex 1 (CD-ROM) but the facilitator may choose different example
- What are possible questions to assist with incorporating gender in programming?
- Linking GRB and performance budgeting
- Performance budgeting and the 3 Es (Economy, Efficiency, and Effectiveness)

#### CONCLUSION

Invite questions and provide answers and references to reading materials.  
Wrap up and introduce the next activity.

# MODULE 2

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## **BUDGET FORMATS AND PROCESSES**

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## SESSION 1: WHAT IS A BUDGET?

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to be able to distinguish between different budget classifications and formats and identify the potential for the gender analysis of each of them.
<b>CONTENT</b>	<ul style="list-style-type: none"><li>• Definition of a budget</li><li>• Budget classifications</li><li>• Budget formats</li><li>• Budget process</li><li>• The structure of a real-life budget: Gauteng Department of Health (Provincial Budget, South Africa), Ministry of Health (National Budget, Pakistan)</li></ul>
<b>HANDOUT</b>	Country Budgets Gauteng Health Budget (South Africa) Pakistan Health Budget
<b>RESOURCE PACK REFERENCE</b>	Page 50: What do budgets look like?
<b>FORMAT</b>	PowerPoint presentation or handouts followed by exercise
<b>SESSION OUTLINE</b>	Presentation: 15 minutes Exercise: 60 minutes <b>Total: 75 minutes</b>

## SESSION 1: WHAT IS A BUDGET?

### GENERAL GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Budget documents include different numbers and types of publications across countries, but all budget documents have the potential to assist in GRB work.
- Common ways of classifying expenditures in a budget are: economic, administrative, functional or program. However, governments often present the budget in more than one way.
- Budget formats can be complicated and overwhelming, but things become simpler when you know the format and conventions for the country you are working in.

#### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.  
Wrap up and introduce the next activity.

# SESSION 1: WHAT IS A BUDGET?

## EXERCISES

Two exercises are proposed for this session. The first exercise is “What does a budget tell us?” and the second exercise involves questioning the budget of the Ministry of Justice (Gauteng 1999/2000). The facilitator can use either the first exercise or the first and second exercises together depending on the time available. It is not advisable to use the second exercise without the first one, as it does not allow the participants to examine the variation in budget formats.

## EXERCISE I: WHAT DOES A BUDGET TELL US?

### INSTRUCTIONS TO FACILITATOR

#### What Does a Budget Tell Us?

Time: 60 minutes

#### MATERIALS NEEDED

Copies of extracts from the Gauteng and Pakistan budget documents  
Flipchart paper  
Markers

#### INSTRUCTIONS

Hand out copies of:

- (a) selected pages from Gauteng’s health budget
- (b) selected pages of Pakistan’s Medium-Term Budget Framework (MTBF) for the Ministry of Health

In plenary, using the PowerPoint presentation entitled “What is a budget?”, take participants through the pages of the two documents, making sure that they understand what each of the sections is about.

Divide participants into groups of 4–5 people. The task for the groups is to discuss what these documents tell them about gender and how the budget caters to the needs of women and men, girls and boys. Ask each group to write up their observations on flipchart paper.

In plenary, ask the groups to report backfocusing each on observations that have not already been made by previous groups.

#### ADAPTATION

Use budgets from countries that are relevant for the participants in your workshop.

# SESSION 1: WHAT IS A BUDGET?

## EXERCISE 2

There are two steps in this exercise. The first step is “Questioning the budget of the Ministry of Justice–Gauteng 1999/2000,” which is intended to familiarize participants with the key elements of a budget. The second step is “Doing budget calculations.” It entails working with participants on basic calculations (adding, subtracting and extracting percentage) to deduct information from the raw figures provided in the budget.

**Time:** 60 minutes (25 minutes for Step One and 35 minutes for Step Two)

### INSTRUCTIONS TO FACILITATOR

#### Questioning the Budget of the Ministry of Justice – Gauteng 1999/2000 – Step I

##### MATERIALS NEEDED

Handout B (justice budget)

Handout C (Program 6)

Handout D (national budget)

##### INSTRUCTIONS

Distribute copies of Handouts B and C. Explain that the national and provincial governments present their budgets in a White Book that follows a standard format. Each department receives its allocation through a “vote.” The most important pages of the White Book are the ones that show:

- (a) The money voted for each department, and how it is allocated to different programs (see Handout B)
- (b) The breakdown of each program into sub-programs (see Handout C)

##### EXPLAIN THE DIFFERENT PARTS OF THE DOCUMENTS:

- Show that some tables are in thousands (R'000) and some in millions (add 000 000).
- Show that the printed budget gives figures for two budget years—the current year (1999/2000) and the most recent year (1998/99).
- Explain that although all budgets are for only twelve months, they are described using two years (separated with a slash) because national and provincial budgets run from April of one year to March of the next. (Local budgets run from July of one year to June of the next).
- Show that the total for Program 6 (R365 058 000) matches the line total for auxiliary and associated services in the justice budget
- Show that the total for 1999/2000 justice budget (R2 351 234 000) approximately matches the total for justice on the national table (Handout D)
- Explain that R2 351,2 million is the same as R2 351 200 000

[25 minutes]



## SESSION 1: WHAT IS A BUDGET?

### **Exercise: Doing budget calculations (Step II)**

Resource Pack reference

What do budgets look like?

#### **MATERIALS NEEDED**

Handout B (justice budget)

Handout C (Program 6)

Handout D (national budget)

Handout F (worksheet)

Calculators

#### **INSTRUCTIONS**

Divide participants into groups of two or three and give them copies of Handout D (national budget), Handout B (justice budget), Handout C (Program 6), Handout F (worksheet), and calculators.

Ask them to answer the questions on the worksheet.

[35 minutes]

#### **ADAPTATION**

The facilitator can choose to merge both steps of the exercise or use them separately depending on time availability and participants' familiarity with the subject.

## SESSION 2: BUDGET PROCESS

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to gain an understanding of budget actors and their different roles in order to identify entry points for GRB in budget processes and budget cycles.
<b>CONTENT</b>	General introduction to the budget process
<b>HANDOUTS</b>	Scrambled Budget Process—Albania Correct Sequence Albania Budget Process Malaysia Budget Process Angeles City, Philippines Budget Process Budget Cycle, Rhonda Sharp, 2003
<b>REFERENCE TO RESOURCE PACK</b>	The budget cycle and opportunities for intervention
<b>FORMAT</b>	Exercise
<b>SESSION OUTLINE</b>	Introduction: 5 minutes Group work: 45 minutes Conclusion (Report and wrap up): 20 minutes <b>Total: 75 minutes</b>

## SESSION 2: BUDGET PROCESS

### INSTRUCTIONS TO FACILITATOR

#### Scrambled Budget Process

##### MATERIALS NEEDED

Four sets of a copy of the Albanian budget process handout, cut into strips corresponding to the steps of the process  
A PowerPoint slide or overhead showing the steps of the Albanian budget process in the correct order

##### INSTRUCTIONS

- (a) Divide participants into four groups.
- (b) Give each group a set of strips corresponding to the different steps of the Albanian budget process.
- (c) Explain that the grey strips are headings reflecting the three main parts of the budget process; the strips with bold writing are sub-headings within the three main parts.
- (d) Ask each group to try to arrange the strips in the correct order to reflect the full budget process.

After the participants have finished working, ask each group to present its solution.

Then show the PowerPoint slide or overhead with the correct order to discuss any differences between this and what the groups put forward.

##### NOTE:

- The budget process might differ from one country to another and across levels of government (local, or national, state or federal).
- The strips reflect the budget process as described from inside government.

##### DISCUSS THE FOLLOWING POINTS:

- Is the budget process different in participants' own countries? How?
- How might a description of the budget process from outside government look?
- What steps are missing from the list?

##### DISCUSS THE FOLLOWING IN A SESSION OR SMALL GROUP (ADDITIONAL 30 MINUTES):

- Which actors (e.g. NGOs, ordinary citizens, elected representatives) are likely to be involved at each step of the budget process?
- Which actors could be involved at each step?



# MODULE 3

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## **TOOLS FOR GENDER BUDGET ANALYSIS**

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## SESSION 1: GRB ANALYSIS TOOLS: DIANE ELSON'S TOOLS

<b>OBJECTIVES</b>	By the end of this session, participants are expected to be able to identify which tools can be used for specific budget analysis purposes and propose additional research methodologies and adaptations to provide the needed evidence and information for policy advocacy purposes. It also enables participants to draw on their gender analysis skills in elaborating a gender-aware policy appraisal.
<b>CONTENT</b>	<ul style="list-style-type: none"> <li>• Key characteristics of Diane Elson's gender budget analysis tools</li> <li>• Main strengths and weaknesses for each of the tools</li> <li>• Rhonda Sharp's three-way categorization</li> <li>• Likely actors</li> </ul>
<b>HANDOUTS</b>	Fact Sheet on GRB tools
<b>REFERENCE TO RESOURCE PACK</b>	Frameworks and tools
<b>FORMAT</b>	PowerPoint presentation or handout followed by exercise
<b>SESSION OUTLINE</b>	Presentation and Q&A: 90 minutes Exercise: 30 minutes <b>Total: 120 minutes</b>

## SESSION 1: GRB ANALYSIS TOOLS: DIANE ELSON'S TOOLS

### GENERAL GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Diane Elson's tools:
- Gender-aware policy appraisal
- Beneficiary assessment
- Sex-disaggregated public expenditure incidence analysis
- Analysis of impact of the budget on time use
- Gender-aware medium-term economic policy framework
- These tools focus on analysis rather than on the development of budgets.
- There is no need to use all these tools.
- These are not the only available tools.
- Rhonda Sharp's three-way categorization
- These tools were used to report post-hoc on budget, not to formulate budget.
- Insist on the strengths and weaknesses of the different tools and provide concrete examples or lessons learnt from using them.

#### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.  
Wrap up and introduce the next activity.



## SESSION 1: GRB ANALYSIS TOOLS: DIANE ELSON'S TOOLS

### EXERCISE: ELABORATION OF A GENDER AWARE POLICY APPRAISAL

The objective of this exercise is to allow participants to utilize their gender analysis skills to determine the main components of a gender aware policy appraisal.

#### INSTRUCTIONS TO FACILITATOR

##### Elaboration of Gender Aware Policy Appraisal

##### TIME

30 minutes

##### MATERIALS NEEDED

None

##### INSTRUCTIONS

After the presentation of GRB analysis tools, ask participants (in groups of two or three) to discuss what additional aspects could/should be covered in a situation analysis, besides a description of the situation of men, women, girls and boys in relation to the sector/problem being addressed. The second slide of the PowerPoint presentation on gender-aware policy appraisal could serve as a starting point for the discussion.

Give participants ten minutes to discuss and then ask the groups to share their suggestions in plenary.

Record the suggestions on a flipchart.

## SESSION 2: COSTING TOOLS: MDG COSTING METHODOLOGIES

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to be able to engage in advocacy for gender responsive budgeting using costing models as a strategic entry point. The session will focus on costing methodologies for reproductive health and gender equality targets.
<b>CONTENT</b>	<p>MDG costing methodologies and examples of government-led costing exercises</p> <ul style="list-style-type: none"> <li>• Components of the UN Millennium project reproductive health costing tool</li> <li>• Opportunities for gender budgeting</li> </ul>
<b>HANDOUTS</b>	Extract of the UN Millennium Project Costing Methodology document– Reproductive health costing module, <a href="http://www.unmillenniumproject.org/documents/Part1-RHCostperCase.xls">http://www.unmillenniumproject.org/documents/Part1-RHCostperCase.xls</a>
<b>REFERENCE TO RESOURCE PACK</b>	Costing the MDGs
<b>FORMAT</b>	PowerPoint presentation or handout followed by exercise
<b>SESSION OUTLINE</b>	<p>Presentation and Q&amp;A: 60 minutes          Exercise: 60 minutes  <b>Total: 120 minutes</b></p>

## SESSION 2: COSTING TOOLS: MDG COSTING METHODOLOGIES

### GENERAL GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Costing the MDGs
- Global estimates
- Millennium Project Tools
- Maternal and reproductive health tools
- Separate costing of gender equality
- Some opportunities for bringing GRB into MDG costing exercises

#### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.  
Wrap up and introduce the next activity.

## SESSION 2: COSTING TOOLS: MDG COSTING METHODOLOGIES

### EXERCISE: DESIGNING COSTING RESEARCH

#### INSTRUCTIONS TO FACILITATOR

##### **Designing Costing Research: Mexico's *Oportunidades* Program**

##### **TIME**

30 minutes

##### **MATERIALS NEEDED**

Copies of handout on *Oportunidades* programs

Flipchart paper and markers

##### **INSTRUCTIONS**

In plenary, ask participants to each read aloud one paragraph of the description of the Mexico's *Oportunidades* program.

Divide the participants into three or four groups. Ask them to design a brief research project showing monetary and other costs imposed by this program on its beneficiaries. Results of the research should subsequently be used in advocacy work. Ask participants to be as concrete as possible, with regard to how they will use the instruments, find their respondents, and analyze their data, etc.

Ask each group to summarize its research design on a flipchart for presentation to plenary.

## SESSION 3: CASE STUDIES OF NON-GOVERNMENT COSTING

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to be able to design costing research to support NGO advocacy work. Specific emphasis is placed on designing costing research to advocate for policies that respond to women's unpaid care work
<b>CONTENT</b>	<ul style="list-style-type: none"> <li>• Maternal mortality in Mexico</li> <li>• VAW in South Africa</li> <li>• Costs of home-based care</li> </ul>
<b>HANDOUTS</b>	Veronica Zebadua Yanez. 2006. GRB work in Fundar Mexico. CSVR. 2005. "The price of protection" Policy Brief. <i>Oportunidades</i> program fact sheet
<b>REFERENCE TO RESOURCE PACK</b>	GRB, reproductive health and unpaid care work Home based care case study Glass of milk case study
<b>FORMAT</b>	PowerPoint presentation or handout followed by discussions/Q&A
<b>SESSION OUTLINE</b>	Presentation and Q&A: 60 minutes <b>Total: 60 minutes</b>

## SESSION 3: CASE STUDIES OF NON-GOVERNMENT COSTING

### GENERAL GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Why might NGOs do costing?
- Few governments do full costing of planned policies.
- NGOs can engage in costing services/policies important for gender equality; comparing calculated costs with budget allocations; advocating for bigger and better budgets
- Women's unpaid/underpaid work subsidizes governments.

Three examples of costing are provided in Annex 1 (CD-ROM) but facilitator may consider context-relevant examples:

- Example of policy: Emergency obstetric care in Mexico
- Example of legislation: Protection orders for VAW in South Africa
- Example of unpaid or underpaid work: Home-based care for HIV/AIDS in Botswana, Zimbabwe and Mozambique

#### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.  
Wrap up and introduce the next activity.

## SESSION 4: ADDRESSING DATA REQUIREMENTS FOR GENDER BUDGET ANALYSIS

<b>OBJECTIVES</b>	Participants are expected to identify different types of data needed for GRB work and possible sources and strategies to deal with data gaps by the end of this session.
<b>CONTENT</b>	<ul style="list-style-type: none"> <li>• Sex-disaggregated vs. gender-sensitive data</li> <li>• Desegregation of budgets</li> <li>• Budget indicators</li> <li>• What is an indicator?</li> <li>• Major data sources</li> <li>• Addressing data gaps: e.g. time use surveys</li> <li>• What can NGOs do?</li> <li>• NGO advocacy on time use: Case study from Tanzania</li> </ul>
<b>HANDOUTS</b>	None
<b>REFERENCE TO RESOURCE PACK</b>	Statistics
<b>FORMAT</b>	PowerPoint presentation or handout followed by discussion and exercise
<b>SESSION OUTLINE</b>	Presentation and Q&A: 60 minutes Exercise: 20 minutes <b>Total: 80 minutes</b>

## SESSION 4: ADDRESSING DATA REQUIREMENTS FOR GENDER BUDGET ANALYSIS

### GENERAL GUIDELINES

#### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

#### KEY MESSAGES

- Both sex-disaggregated and gender-sensitive data are needed for GRB.
- Lack of desegregation of budget figures does not mean gender analysis is impossible.
- Types of indicators used in performance budgeting
- Sources of data: administrative data vs. censuses and surveys
- Lack of gender statistics must not prevent GRB work from happening.
- NGOs can undertake small-scale data investigations, analyze existing data or work with government statistics agencies to collect more accurate data on gender.

#### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.



# SESSION 4: ADDRESSING DATA REQUIREMENTS FOR GENDER BUDGET ANALYSIS

## EXERCISE 1: INDICATOR DEVELOPMENT

### INSTRUCTIONS TO FACILITATOR

#### Indicator Development

#### MATERIALS NEEDED

None

#### INSTRUCTIONS

Divide participants into four groups.

Ask the first two groups to examine a Safe Motherhood program.

Ask the second two groups to study an HIV/AIDS program.

Ask participants to identify the following:

- four or five key activities to be included in the program
- four indicators that show the situation to be addressed by the program
- four or five indicators that show the outputs of the program
- three or four indicators that show the outcomes of the program

Ask participants to write their suggested indicators on flipchart for presentation in plenary .

#### ADAPTATION

Participants can select program profiles according to their interest.

## SESSION 4: ADDRESSING DATA REQUIREMENTS FOR GENDER BUDGET ANALYSIS

### EXERCISE 2: NEGOTIATING A TIME USE SURVEY

#### INSTRUCTIONS TO FACILITATOR

##### Negotiating a Time Use Survey

##### MATERIALS NEEDED

Copies of role briefs

##### INSTRUCTIONS

Give each participant a copy of the role play instructions.

Read out the paragraphs describing the background information.

Assign a participant who is confident and has a sense of humour to be the Minister of Finance.

Assign the other roles at random. Do not let participants choose which role they want to take on. If there are more participants than roles, participants can work in groups representing a particular interest group.

Give participants 10 minutes to decide what their own position is in relation to the time use survey. Then give them 15–20 minutes to “caucus” with other groups about how they can support each other’s positions.

Then hand over the proceedings to the Minister of Finance, who must “chair” the meeting, giving each person at least one chance to speak. Inform the Minister of Finance before the meeting happens how long you have allocated for the process.

At the end of the meeting, ask participants to discuss in plenary:

- How realistic was the role play?
- How could advocates for the time use survey have done better?
- What other lessons can we draw from the role play?

# MODULE 4

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## **EXPERIENCES OF GENDER BUDGET INITIATIVES (GBIS)**

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## SESSION 1: EXPERIENCES OF GENDER BUDGET INITIATIVES

<b>OBJECTIVES</b>	By the end of this session, the participants should be informed about the wide range of experiences and diverse approaches of gender budget initiatives.
<b>CONTENT</b>	<ul style="list-style-type: none"><li>• Key components and strategies of gender budget initiatives</li><li>• Mapping of gender budget initiatives and possible entry points for GBIs</li><li>• Overview of UNIFEM GRB Programming</li></ul>
<b>HANDOUTS</b>	None
<b>REFERENCE TO RESOURCE PACK</b>	Gender budget initiatives are mentioned throughout the resource pack
<b>FORMAT</b>	PowerPoint presentation or handout followed by discussion
<b>SESSION OUTLINE</b>	Presentation: 15 minutes Q&A: 30 minutes <b>Total: 45 minutes</b>

# SESSION 1: EXPERIENCES OF GENDER BUDGET INITIATIVES

## GENERAL GUIDELINES

### PRIOR TO SESSION

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

### INTRODUCTION

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.

### KEY MESSAGES

- Gender budget initiatives involve a variety of purposes, actors and entry points.
- Gender budget initiatives can use a wide range of strategies including capacity building and skill development, research and analysis, policy and data advocacy, and partnership building and networking.
- History of gender budget initiatives
- Overview of UNIFEM GRB work: countries targeted, entry points, strategies used, outcomes and lessons learnt
- Gender budget analysis is not only about budgets; there needs to be a stronger connection to macroeconomic policy analysis using budgets as entry points.
- Knowledge building and development needs to be a continuous priority in working towards gender responsive budgets.

### CONCLUSION

Invite questions and discussions.  
Offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.  
Wrap up and introduce the next activity.

## SESSION 2: CASE STUDIES

<b>OBJECTIVES</b>	By the end of this session, the participants have examined in detail two experiences on gender budgets.
<b>CONTENT</b>	Presentation of the content and process of gender budget initiatives by partner organizations
<b>HANDOUTS</b>	Country case studies: Latin America, Morocco, Philippines, India, Mozambique Sample list of steps developed in Cape Town
<b>REFERENCE TO RESOURCE PACK</b>	Throughout the document
<b>FORMAT</b>	PowerPoint presentation of country case studies followed by exercise
<b>SESSION OUTLINE</b>	Introduction of exercise: 3 minutes Group work: 30 minutes Report back: 10 minutes Conclusion: 2 minutes <b>Total: 45 minutes</b>

## SESSION 2: CASE STUDIES

### GENERAL GUIDELINES

#### **PRIOR TO SESSION**

Review relevant sections of the resource pack and prepare PowerPoint presentation or handouts.  
Prepare flipchart with objectives of the session and hang on a wall for reference.

#### **INTRODUCTION**

Read or have participants read out loud the objectives of the session.  
Indicate at which stage of the road map the session stands.  
Describe the process of the session.  
Invite presentations from partner organizations.

#### **KEY MESSAGE**

Diversity of country experiences in carrying out GRB initiatives and lessons to be learned from each of them

#### **CONCLUSION**

Open the floor for questions and discussions.  
Ask presenters to offer necessary clarifications.  
Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.



## SESSION 2: CASE STUDIES

### EXERCISE: EXAMINING A GENDER BUDGET INITIATIVE

#### INSTRUCTIONS TO FACILITATOR

#### Examining a Gender Budget Initiative

##### MATERIALS NEEDED

Handouts of country case studies on GRB

Flipchart and markers

##### INSTRUCTIONS

Divide participants into three or four groups. Give each group handouts from two different countries. Ensure that each country is covered by at least two groups.

Ask participants to read through the country case studies and analyze them in terms of:

- actors and their roles
- key strategies
- strengths
- weaknesses

Ask participants to put their findings on a flipchart. Remind them that not all participants have read all case studies. Therefore they must make their points very clear so everyone can understand them.

In plenary, ask each group to provide a brief report. Organize the report with separate sections for each country, so that participants can identify any differences in the various groups' analyses of a particular country.

At the end of the discussion, encourage participants to read in their spare time the case studies for countries that were not given to their group.



# MODULE 5

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## **GBIS FROM WITHIN GOVERNMENT**

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## SESSION 1: GENDER BUDGET STATEMENTS

<b>OBJECTIVES</b>	By the end of this session, participants are expected to be familiar with the types and purpose of gender budget statements and to be able to support line ministries in the preparation of gender budget statements, building on experiences from other countries.
<b>CONTENT</b>	<ul style="list-style-type: none"><li>• Definition of a gender budget statement</li><li>• Purpose of gender budget statement</li><li>• Cases from India, Rwanda and Gauteng province (South Africa)</li></ul>
<b>HANDOUTS</b>	Copies of India, Rwanda and Gauteng gender budget statements
<b>REFERENCE TO RESOURCE PACK</b>	Mentioned at various points, including as one of the Elson tools
<b>FORMAT</b>	PowerPoint presentation followed by exercise
<b>SESSION OUTLINE</b>	Presentation: 10 minutes Group work: 75 minutes Conclusion: 5 minutes <b>Total: 90 minutes</b>

# SESSION 1: GENDER BUDGET STATEMENTS

## GENERAL GUIDELINES

### PRIOR TO THE SESSION

Prepare PowerPoint presentation or handout based on key messages.

Prepare flipchart with the objective(s) of the session and hang on wall throughout the session for reference.

### INTRODUCTION

Read out loud the objectives of the session.

Indicate at which stage of the road map the session stands.

Describe the process of the session.

### KEY MESSAGES

- Nature and purpose of gender budget statement
- Reasons for including gender budget statement in GRB work
- Format and components of gender budget statements
- Background to India example
- Background to Rwanda example
- Background to Gauteng example

### CONCLUSION

Invite questions/discussions and offer necessary clarifications.

Refer back to the objectives of the session and check in with participants to ensure that the stated objectives are met.

Wrap up and make the transition to the exercise.

# SESSION 1: GENDER BUDGET STATEMENTS

## EXERCISE: ANALYZING GENDER BUDGET STATEMENTS FROM INDIA, RWANDA AND SOUTH AFRICA (GAUTENG PROVINCE)

Time: 75 minutes

### INSTRUCTIONS TO FACILITATOR

#### Analyzing Gender Budget Statements

##### MATERIALS NEEDED

Copies of gender budget statements from India (full statement), Rwanda (HIV sub-program of the Ministry of Health) and Gauteng province (Department of Health).

Flipchart paper and markers.

##### INSTRUCTIONS

During the PowerPoint presentation, make sure that participants understand the background and approach used in each of the three countries.

Ask participants to work with the people sitting next to them to examine each of the three gender budget statements and come up with constructive suggestions as to:

- how the government concerned could improve the way they portray existing programs/activities on the basis of the format agreed upon
- how the government concerned could improve the program/activities reflected in the gender budget statement

Ask the groups to focus their attention primarily on the first aspect, and to put themselves in the position of advisors to the government rather than outside critics.

In plenary, request suggestions on each of the countries in turn. Write up the suggestions on the flipchart.

## SESSION 2: CALL CIRCULARS: CASES FROM TANZANIA AND MALAYSIA

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to be knowledgeable about Ministry of Finance Call Circulars and able to identify strategic interventions to engender the call circular and the related political and technical challenges.
<b>CONTENT</b>	Group discussion on call circulars and exercise analyzing the call circulars from two countries
<b>HANDOUTS</b>	None
<b>REFERENCE TO RESOURCE PACK</b>	Call circulars are mentioned on various occasions in the resource pack.
<b>FORMAT</b>	Plenary discussion followed by exercise



## SESSION 2: CALL CIRCULARS: CASES FROM TANZANIA AND MALAYSIA

### EXERCISE: EXAMINING CALL CIRCULARS FROM A GENDER PERSPECTIVE

Time: 45 minutes

#### INSTRUCTIONS TO FACILITATOR

##### Examining Call Circulars from a Gender Perspective

##### MATERIALS NEEDED

Copies of the Tanzania and Malaysia call circulars

##### GROUP WORK

Task: To make suggestions as to how the Malaysian call circular can be made gender-sensitive

##### INSTRUCTIONS

Give each participant a copy of the call circular. Explain that this is the call circular for the five-year plan, which is the basis of the development budget in Malaysia.

Ask participants to take turns reading the call circular, with each person reading one paragraph.

Pause after each paragraph to discuss whether the participants have any ideas for changes that would make the call circular more gender-sensitive

## CLOSING SESSION: SUPPORTING GRB WORK

<b>OBJECTIVES</b>	By the end of this session, the participants are expected to be able to integrate gender budgeting tools and strategies in their programming.
<b>CONTENT</b>	Where and how can UNFPA and UNIFEM contribute to countries' transitions towards gender responsive budgets?
<b>HANDOUTS</b>	None
<b>REFERENCE TO RESOURCE PACK</b>	The entire resource pack provides insights on supporting GRB work.
<b>FORMAT</b>	PowerPoint presentation followed by group discussion and exercise

# CLOSING SESSION: SUPPORTING GRB WORK

## GENERAL GUIDELINES

### PRIOR TO THE SESSION

Prepare PowerPoint presentation or handout based on highlighted key messages.

Prepare flipchart with the objective(s) of the session and hang on wall throughout the session for reference.

### INTRODUCTION

Read out loud the objectives of the session.

Indicate at which stage of the road map the session stands.

Describe the process of the session.

### KEY MESSAGES

- GRB work: purpose, tools, entry points, stakeholders' analysis
- Strategies for supporting GRB work

### CONCLUSION

Invite questions and discussions.

Offer necessary clarifications.

Refer back to the objectives of the session and check in with participants to ensure the stated objectives were met.

Wrap up and introduce the next activity.

# CLOSING SESSION: SUPPORTING GRB WORK

## EXERCISE: KEY QUESTIONS FOR GRB PROGRAM DEVELOPMENT

Time: 60 minutes

### INSTRUCTIONS TO FACILITATOR

#### Key Questions for GRB Program Development

#### MATERIALS NEEDED

Flipcharts

#### INSTRUCTIONS

Divide participants into three groups. Ask them to formulate a program with a GRB angle by responding to questions on

- (a) the purpose of the GBI
- (b) tools
- (c) entry points and stakeholders
- (d) strategies in the following contexts:
  - In a country that recently passed a law on domestic violence
  - To promote the increase of female condom users
  - To address high maternal mortality in a specific community

Groups report back and discuss their findings in plenary.





## ANNEX 1: CD-ROM CONTAINING

1. **Training module resources:**
  - a. PowerPoint presentations per session
  - b. Handouts per session
2. **Resource Pack: “Budgeting for Reproductive Rights: Using Gender Responsive Budgeting”**
3. **List of key readings on gender responsive budgeting**

## ANNEX 2: SUGGESTED WORKSHOP PROGRAM

### DAY I

#### INTRODUCTORY SESSION

9:00–9:15	Welcome
9:15–10:00	Participants' introductions
10:00–11:00	Exercise
11:00–11:30	A Road Map to Gender Responsive Budgeting

#### MODULE 1: GENDER BUDGETING: CONCEPTS, PRINCIPLES AND PROCESSES

11:30–12:15	Session 1: GRB concepts and principles
12:15–12:45	Session 2: GRB Processes: Planning and policy transformation
12:45–1:45	Lunch break

#### MODULE 2: BUDGET FORMATS AND PROCESSES

1:45–2:00	Session 1: What is a budget?
2:00–3:30	Exercise: What does a budget tell us?
3:30–4:45	Session 2: Budget process exercise
4:45–5:00	Wrap up

## ANNEX 2: SUGGESTED WORKSHOP PROGRAM

### DAY II

#### 9:00–9:15 REPORT BACK FROM DAY I

#### MODULE 3: TOOLS FOR GENDER BUDGET ANALYSIS

9:15–10:45	Session 1: GRB analysis tools: Diane Elson's tools
10:45–11:15	Elaboration of gender-aware policy appraisal
11:15–11:30	Coffee break
11:30–12:30	Session 2: Costing tools: MDG costing methodologies
12:30–1:30	Lunch break
1:30–2:30	Exercise: Designing Costing Research
2:30–3:30	Session 3: Case studies of non-government costing
3:30–4:30	Session 4: Addressing data requirements for gender budget analysis
4:30–5:00	Exercise: Negotiating for a time use survey

### DAY III

#### 9:00–9:15 REPORT BACK FROM DAY II

#### MODULE 4: EXPERIENCES OF GENDER BUDGET INITIATIVES

9:15–10:00	Session 1: Experiences of gender budget initiatives
10:00–10:45	Session 2: Case studies
10:45–11:00	Coffee break

#### MODULE 5: GENDER BUDGET INITIATIVES FROM WITHIN GOVERNMENT

11:00–11:30	Session 1: Gender budget statements
11:30–12:30	Exercise: Analyzing gender budget statements
12:30–1:30	Lunch
1:30–2:30	Session 2: Examining call circulars from a gender perspective

#### FINAL SESSION

2:30–3:30	Supporting GRB work
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#### CONCLUSIONS AND EVALUATION

3:30–4:00	Evaluation
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## ANNEX 3: EXAMPLE OF WORKSHOP EVALUATION FORM

### 1. HOW DO YOU RATE THE TRAINING MANUAL IN RELATION TO ITS INTENDED OBJECTIVES?

- 1) Building in-depth understanding of GRB as a policy advocacy and technical tool
- 2) Developing skills needed to initiate programming that supports GRB work at country level

#### Regarding Objective 1

Very good       Good       Average       Poor       Very Poor

#### Regarding Objective 2

Very good       Good       Average       Poor       Very Poor

Please add any other comments you have.

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### 2. HOW DO YOU RATE THE FACILITATION OF THIS WORKSHOP?

Very good       Good       Average       Poor       Very Poor

Please add any other comments you have on the facilitation.

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### 3. HOW DO YOU RATE THE HANDOUTS AND READING MATERIALS PROVIDED AT THE WORKSHOP?

Very good       Good       Average       Poor       Very Poor

Please add any other comments you have on the materials provided.

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### 4. HOW WOULD YOU RATE THE VENUE, ACCOMMODATION AND OVERALL LOGISTICS PROVIDED FOR THIS WORKSHOP?

Very good       Good       Average       Poor       Very Poor

Please add any other comments you have on the logistics.

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## **ANNEX 3: EXAMPLE OF WORKSHOP EVALUATION FORM**

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**5. WHAT HAVE YOU LEARNED THROUGH THE TRAINING WORKSHOP?**

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**6. WHICH FACTORS FACILITATED OR HINDERED YOUR LEARNING?**

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**7. HOW DO YOU INTEND TO USE YOUR LEARNING?**

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**8. WHICH IMPROVEMENT (S) (IF ANY) WOULD YOU LIKE TO SEE IN THE OVERALL DESIGN, DELIVERY AND METHODOLOGY OF THE WORKSHOP OR THE TRAINING MANUAL?**

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## ANNEX 4: LIST OF HANDOUTS AND KEY REFERENCES PER SESSION

<b>INTRODUCTORY SESSION</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handouts</b>	<b>Key References</b>
Opening ceremony			
Exercise: Negotiating a household budget		Copies of basic household budgets, copies of instructions for each family and family members	
Manual Road map	Gender Responsive Budgeting: Workshop objectives and road map	Workshop program Training manual	

<b>MODULE 1: GENDER BUDGETING: CONCEPTS, PRINCIPLES AND PURPOSES</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handouts</b>	<b>Key References</b>
Session 1: GRB concepts and principles	Gender-Responsive Budgeting: Concepts and Principles	Fact Sheet: Government accountability to Human Rights through budgets, UNIFEM, 2005	Budlender, Debbie et al. . Gender Budgets Make Cents. London: Commonwealth Secretariat, 2002. UNIFEM, "Gender Responsive Budgets: Strategies, Concepts and Experiences." (paper from a High Level International Conference on Strengthening Economic and Financial Governance Through Gender Responsive Budgeting, Brussels, Belgium October 16 – 18, 2001) Institute of Development Studies. Gender Budgets Cutting Edge Pack (also see UNDP Bridge CD-ROM). Brighton: Institute of Development Studies 2003. Elson, Diane. Budgeting for Women's Rights. New York: UNIFEM, 2006.
Session 2: GRB Processes: Planning and policy transformation	Planning and policy transformation How can GRB assist?	Refer to CD-ROM to identify relevant key readings to handout	Budlender, Debbie et al. . Gender Budgets Make Cents. London: Commonwealth Secretariat, 2002. Sharp, Rhonda. Budgeting For Equity. New York: UNIFEM, 2003.

## ANNEX 4: LIST OF HANDOUTS AND KEY REFERENCES PER SESSION

MODULE 2: BUDGET FORMATS AND PROCESSES			
Session	Presentation	Handouts	Key References
Session 1: What is a budget?	Budget Classifications and formats		Sectoral Budgets of Different Countries
Exercise 1: What does a budget tell us?		Country Budgets Gauteng Health Budget, South Africa Pakistan Health Budget	
Exercise 2: Questioning the budget of the Ministry of Justice – Gauteng 1999/2000		Gauteng: Justice budget, Program 6 budget and national budget	
Session 2: Budget process exercise Exercise: Scrambled budget process		Scrambled Budget Process—Albania Correct Sequence Albania Budget Process Malaysia budget process Angeles City, Philippines Budget Process Budget Cycle Rhonda Sharp 2003	Wehner, Joachim and Byanyima, Winnie. Parliament, the Budget and Gender. Geneva: IPU, 2004. Budlender, Debbie and Hewitt, Guy. Engendering Budgets: A Practitioners' Guide to Understanding and Implementing Gender Responsive Budgets London: Commonwealth Secretariat, 2003.

## ANNEX 4: LIST OF HANDOUTS AND KEY REFERENCES PER SESSION

<b>MODULE 3: TOOLS FOR GENDER BUDGET ANALYSIS</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handout</b>	<b>Key Reference</b>
<b>Session 1: GRB analysis tools: Diane Elson's tools</b>	GRB analysis tools: an introduction	Fact Sheet, GRB Tools, UNIFEM	UNIFEM. Progress of the World's Women. New York: UNIFEM, 2000.
<b>Exercise: Elaboration of a gender aware policy appraisal</b>			
<b>Session 2: Costing tools: MDG costing</b>	Costing the MDGs with a focus on gender and reproductive health	Extract of the UN Millennium Project Costing Methodology Reproductive health costing module	
<b>Exercise: Designing Costing Research: Mexico's Oportunidades Program</b>		Copy of Mexico's Oportunidades program	
<b>Session 3: Case studies of non-government costing</b>	Costing outside the governments: three case studies	Veronica Zebadua Yanez, GRB work by Fundar Mexico, 2006 CSVR "The price of protection" Policy Brief, 2005 Oportunidades program fact sheet	Luciano, D., Esim, S., and Duwury, N. How to make the law work? Budgetary Implications of Domestic Violence Policies in Latin America, Synthesis paper. International Center for Research on Women, 2003. Andia Perez, Bethsabe, et al. Gender Sensitive Budgets in Latin America: Accountability for Equity and Transparency. UNIFEM, 2004.
<b>Session 4: Addressing data requirements for gender budget analysis</b>	Data requirements for GRB: there are more possibilities available than you think!		
<b>Exercise 1: Indicator development</b>			
<b>Exercise 2: Negotiating a time use survey</b>		Copies of role play instructions and role description	

## ANNEX 4: LIST OF HANDOUTS AND KEY REFERENCES PER SESSION

<b>MODULE 4: EXPERIENCES OF GENDER BUDGET INITIATIVES (GBIS)</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handout</b>	<b>Key References</b>
Session 1: Experiences of gender budget initiatives	Gender Budget Initiatives: Mapping and Overview		UNIFEM.. A Learning Programme in Action: UNIFEM Gender Responsive Budgeting Programme Mid-term Review Summary Report. New York: UNIFEM, 2004. Budlender, Debbie, et al. Gender Budgets Make Cents. London: Commonwealth Secretariat, 2002.
Session 2: Case studies	Gender budget initiatives led by partner-organizations	Country case studies: Latin America, Morocco, Philippines, India, Mozambique Sample GRB checklist developed in Cape Town	
Exercise:Examining a gender budget initiative		Copies of country case studies: Latin America, Morocco, Philippines, India, Mozambique	

## ANNEX 4: LIST OF HANDOUTS AND KEY REFERENCES PER SESSION

<b>MODULE 5: GENDER BUDGET INITIATIVES FROM WITHIN GOVERNMENT</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handout</b>	<b>Key References</b>
Session 1: Gender budget statements	Gender budget statements: Nature and purpose	Copies of India, Rwanda and Gauteng gender budget statements	
Exercise: Analyzing gender budget statements		Copies of gender budget statements from India (full statement), Rwanda (HIV sub-program of Ministry of Health/ MINISANTE) and Gauteng province (Department of Health)	
Session 2: Call circulars: Cases from Tanzania and Malaysia			Budlender, Debbie and Hewitt, Guy. Gender Budgets Make More Cents. London: Commonwealth Secretariat, 2002.
Exercise: Examining call circulars from a gender perspective		Copies of Tanzania and Malaysia call circulars	

<b>CLOSING SESSION: SUPPORTING GRB WORK</b>			
<b>Session</b>	<b>Presentation</b>	<b>Handout</b>	<b>Key References</b>
Supporting GRB work	Using GRB as a tool: Where and how can UNIFEM and UNFPA contribute to countries' transitions towards gender responsive budgets?		
Exercise: Key questions for GRB program development			

Find more resources on Gender Responsive Budgeting at [www.genderbudgets.org](http://www.genderbudgets.org)





