



United Nations

Division for the Advancement of Women

**Regional Training Workshop on Gender-Sensitive
National Planning for National Mechanisms for the
Advancement of Women**

REPORT

**Dar es Salaam, Tanzania
4-7 December 2001**

EXECUTIVE SUMMARY

To enhance the capacity of national machineries to advance gender equality within their countries, the Division for the Advancement of Women (DAW) and the Division for Public Economics and Public Administration (DPEPA) is implementing a three-year project on Capacity-building for Promoting Gender Equality in the African Countries. In this context, a Regional Training Workshop on Gender-Sensitive National Planning for National Machineries for the Advancement of Women, was held in Dar es Salaam, Tanzania from 4 to 7 December 2001. The workshop was organised for 5 Anglophone countries identified as pilot countries, Ethiopia, Ghana, Malawi, Rwanda and Swaziland and included Tanzania, as the host country.

The workshop brought together representatives from national gender machineries and the line ministries of finance and planning from the respective pilot countries. There were a total of 27 participants, 15 women and 12 men. The session aimed to:

1. Strengthen and/or develop conceptual understanding and skills of key government officials in gender-sensitive planning and budgeting;
2. Identify opportunities and challenges for effective gender-responsive planning and budgeting;
3. Develop country-specific immediate action plans for engendering planning and budgeting processes; and
4. Develop a sub-regional strategy for operationalising gender-sensitive national planning with particular reference to the role of national machineries and gender focal points.

A team involving DAW staff, a member of the Regional Task Force (Executive Director of the National Commission on the Role of Filipino Women), and staff members of the Tanzania Gender Networking Programme (TGNP) facilitated the workshop. The methodology was participatory, combining visual presentations (on flip charts, overhead projectors and VIPP cards) with working groups and plenary discussions. An Adult Learning approach/participatory methodology was utilized, whereby the workshop emphasised the importance of drawing from the insights, experiences and expertise of the participants.

The workshop was officially opened by Ms. Mary Mushi, Permanent Secretary of the Ministry of Community Development, Women Affairs and Children (MCDWAC), Tanzania, on behalf of the host country, and Ms. Tsu-Wei Chang of DAW. Participants also had an opportunity to visit TGNP to gain insight into the work of a local training and advocacy organisation that initiated the gender budgeting process in Tanzania.

The workshop began with a discussion on basic gender concepts as they relate to gender budgeting and planning and then focused on the principles for their application, through case studies from the Philippines and Tanzania. Afterwards, small working groups focused on the application of gender planning and budgeting concepts to the participants'

political/economic systems. Following these exercises, participants presented an overview of the best practices in gender planning and budgeting in their respective countries, conducted a review of the gender sensitivity of their national planning processes, and devised a series of recommendations for improvement at the national and regional level.

During the training, participants identified major areas for action at the national level. Particular emphasis was given to building capacity to engendering the national planning and budgeting processes. Steps to be taken include, among others, development or review of a national gender policy and action plan, developing tools to facilitate mainstreaming gender into planning and budgeting processes, and strengthening the role of the national gender machinery as a co-ordinator of the above actions. Participants also requested support from outside resources, particularly from DAW and regional expertise, to assist with the national-level mainstreaming process and the development of tools and manuals at the national level.

The workshop evaluation revealed that the session achieved its objectives to a great degree and that participants were satisfied with the facilitation of the workshop.

TABLE OF CONTENTS

ABBREVIATIONS

SECTION 1: INTRODUCTION.....	1
1.1 BACKGROUND.....	1
1.2 OBJECTIVES	2
1.3 PARTICIPANTS.....	2
1.4 FACILITATION/METHODOLOGY.....	2
1.5 BACKGROUND DOCUMENTATION	3
SECTION 2: WORKSHOP PROCEEDINGS	3
2.1 OPENING STATEMENTS	3
2.2 VISIT TO TANZANIA GENDER NETWORKING PROGRAMME (TGNP).....	4
2.3 EXPECTATIONS.....	4
2.3 KEY CONCEPTS IN GENDER PLANNING AND BUDGETING.....	4
2.4 CASE STUDY ON GENDER-SENSITIVE NATIONAL PLANNING AND BUDGETING: CASE STUDIES OF PHILIPPINES AND TANZANIA	5
2.5 PRINCIPLES OF GENDER SENSITIVE PLANNING AND BUDGETING.....	7
2.6 COUNTRY WORKING GROUPS ON APPLICATION OF THE PRINCIPLES	7
2.7 COUNTRY BEST PRACTICES IN GENDER MAINSTREAMING PLANNING AND BUDGETING.....	8
2.8 INTRA-DISCIPLINARY WORKING GROUPS	9
2.9 SHARING OF BASIC TOOLS FOR GENDER REVIEW OF NATIONAL PLANNING AND BUDGETING.....	10
2.10 COUNTRY WORKING GROUPS TO DEVELOP ACTION PLAN FOR MAINSTREAMING GENDER IN PLANNING AND BUDGETING.....	11
SECTION 3: COUNTRY ACTION PLANS	12
3.1 DEVELOPMENT OF IMMEDIATE FOLLOW-UP ACTION PLANS BY COUNTRY	12
3.2 DEVELOPING A REGIONAL STRATEGY.....	13
3.3 CONCLUSION AND CLOSING.....	15
SECTION 4: EVALUATION AND CONCLUSION	17
4.1 EVALUATION.....	17
4.2 CONCLUSION.....	18

ANNEXES:

A. List of Participants	G. Country Reports on Best Practices of Mainstreaming Gender in Planning and Budgeting
B(i) Timetable	H. Intra-Disciplinary Working Groups
B(ii) Conference Format	I. Sharing of Tools for Gender Planning and Budgeting
C. Opening Speeches	J. Country Action Plans for Mainstreaming Gender in Planning and Budgeting
D. Key Concepts in Gender Planning and Budgeting	K. Country Immediate Action Plans
E. Case Studies on Gender Planning and Budgeting	L. Summary of Evaluation Responses
F. Country Working Groups Applications of Principles for Gender Planning and Budgeting	

ABBREVIATIONS

DAW	Division for the Advancement of Women
DESA	Department of Economic and Social Affairs
FP	Focal Point
GFP	Gender Focal Points
MCDWAC	Ministry of Community Development, Women Affairs and Children
MDA	Ministry, Department and Agency
MTEF	Mid-term Expenditure Framework
NM	National Machinery
PER	Public Expenditure Review
PFA	Platform for Action
PRSP	Poverty Reduction Strategy Paper
TGNP	Tanzania Gender Networking Programme
VIPP	Visualization in Participatory Planning

SECTION 1: INTRODUCTION

1.1 Background

The Fourth World Conference on Women in Beijing (1995) identified institutional mechanisms for the advancement of women as one of the 12 critical areas of concern in the Beijing Platform for Action. The issue of national machineries and their critical role in promoting gender equality and the advancement of women forms an important part of the mandate and work of the Division for the Advancement of Women (DAW).

The 23rd special session of the United Nations General Assembly on “*Women 2000: Gender Equality, Development and Peace for the Twenty-first Century*” in June 2000, clearly highlighted the central and critical role of national machineries in moving forward the global gender agenda. The Beijing Platform for Action called upon governments to transform national machineries into central policy coordinating units to support gender mainstreaming in government policies and programs. Given the results which emerged from the Beijing +5 process, there was a clear need to revisit the existing mandate of national machineries as well as the implications of new and emerging areas for action as reflected in the Outcome Document.

To support the achievement of this process, the Division for the Advancement of Women (DAW) and the Division for Public Economics and Public Administration (DPEPA) is implementing a three-year project on Capacity-building for Promoting Gender Equality in the African Countries. The project aims to:

- a) Strengthen existing national machineries;
- b) Enhance the capacity of national machineries related to ensuring the advancement of women and mainstreaming a gender perspective; and
- c) Strengthen capacities of women in decision-making in the public sector in particular, by increasing women’s ability to participate in and have influence over the policy-making process.

In fulfilment of these objectives, DAW organised a one-day consultation with several countries on “*the Role of National Machineries in Beijing +5 Follow-up and National Agenda Setting*” on 12 June 2000 in New York. The consultation was followed by a regional meeting, held in Addis Ababa in April 2001, to devise an implementation schedule and monitoring mechanisms for the project and to set up a Regional Task Force. Future activities of the project also include capacity building to improve data collection disaggregated by sex as well as the organization of leadership training courses.

A Regional Training Workshop on Gender-Sensitive National Planning and Budgeting for National Machineries for the Advancement of Women, was held in Dar es Salaam, Tanzania from 4 to 7 December 2001. This workshop was organised by the Division for the Advancement of Women (DAW) of the Department of Economic and Social Affairs (DESA). The training targeted 5 Anglophone pilot countries, Ethiopia, Ghana, Rwanda,

Malawi, and Swaziland as well as Tanzania, as the host country. A similar workshop will be held next year for the pilot Francophone countries.

1.2 Objectives

The workshop aimed:

1. Strengthen/develop conceptual understanding and skills of key government officials in gender-sensitive planning and budgeting;
2. Identify opportunities and challenges for effective gender-responsive planning and budgeting;
3. Develop country-specific immediate action plans for engendering planning and budgeting processes; and
4. Develop a sub-regional strategy for operationalising gender-sensitive national planning with particular reference to the role of national machineries and gender focal points.

1.3 Participants

The training brought together representatives from national gender machineries and the line ministries of finance and planning from Swaziland, Ghana, Malawi, Ethiopia, Rwanda, and Tanzania. There were a total of 27 participants, 15 women and 12 men (see *List of Participants, Annex A*).

1.4 Facilitation/ Methodology

A team including DAW, a representative from the Regional Task Force (Executive Director of the National Commission on the Role of Filipino Women), and staff members of the Tanzania Gender Networking Programme (TGNP) facilitated the workshop.¹ The methodology was participatory, combining visual presentations (on flip charts, overhead projectors and VIPP cards) with working groups and plenary discussions. An Adult Learning approach/participatory methodology was utilized, whereby the workshop emphasised the importance of drawing from the insights, experiences and expertise of the participants.

The workshop spanned four days. The workshop began with a discussion on basic gender concepts as they relate to gender budgeting and planning and then focused on the principles for their application, through case studies from the Philippines and Tanzania. Afterwards, small working groups focused on applications of gender planning and budgeting concepts to the participants' home countries. Following these exercises, participants presented an overview of the best practices in gender planning and budgeting in their respective countries, conducted a review of the gender sensitivity of their national planning processes, and devised a series of recommendations for improvement at the national and regional level. They also had an opportunity to visit the Tanzania Gender Networking Programme (TGNP) to gain insight into the work of the local training and advocacy organisation that initiated the gender budgeting process in Tanzania. (See *Timetable, Annex B(i)* and *Workshop Format, Annex B(ii)*).

¹ For the purposes of this report, each of these members of the training team will be referred to interchangeably as 'the facilitator.'

1.5 Background documentation

The background documentation file for the workshop included the project document, the report from the Regional Meeting held in Addis Ababa and the findings of the review of training institutions. It also included an overview of basic concepts relating to gender budgeting and planning, a training tool on gender mainstreaming the Ministry of Finance developed by the Commonwealth Foundation, a booklet on CEDAW, and information on the concepts, processes and tools utilised in Tanzania's gender budgeting work. Results from a pre-workshop DAW questionnaire on planning and budgeting in the participants' respective countries were also included.

SECTION 2: WORKSHOP PROCEEDINGS

2.1 Opening Statements

Ms. Tsu-Wei Chang of the Division for the Advancement of Women invited Ms. Mary Mushi, Permanent Secretary of the Ministry for Community Development, Women Affairs and Children (MCDWAC) of Tanzania to make the opening statement to the workshop. On behalf of the host country, Ms. Mushi welcomed the participants and the organisers to Tanzania. She noted that the workshop organisers had found a strong partner in TGNP, due to their extensive experience on gender issues, particularly gender planning. She stated that the teamwork between the Ministry of Finance, the Planning Commission, the MCDWAC and TGNP in implementing gender budgeting had shown the benefits of close collaboration between government and NGOs. She noted that the government, under the co-ordination of the MCDWAC, had passed a number of progressive policies supported by the Tanzanian Constitution, which guarantees equality for all. Ms. Mushi appreciated the fact that this workshop was being held in Tanzania and remarked that this was likely due to the local capacity in gender planning and budgeting. She welcomed the opportunity to share experiences on these issues with participants from other countries.

Ms. Tsu-Wei Chang then welcomed participants on behalf of DAW and delivered a statement on behalf of Fatiha Serour, Chief of Gender Advisory Services Unit, DAW (see *Opening Statements, Annex C*). She thanked the Government of Tanzania for hosting the workshop and TGNP for working as partners to co-facilitate the workshop. She acknowledged that, in fact, the choice to hold the workshop in Tanzania was due to the available local capacity, and that, furthermore, the project aimed to work with local institutions to build their capacity in order to enhance programme sustainability. She explained that this workshop was part of a 3-year Division of Advancement of Women project aimed at strengthening the capacity of national machineries for gender equality. She noted that the project's objectives are in recognition of the crucial role that national machineries have played since the Beijing Conference in 1995 and their expanded role from women's issues to gender mainstreaming. In detailing this workshop's background, she indicated that as part of the project, DAW conducted a needs assessment that highlighted obstacles to the effectiveness of national machineries, including an unclear mandate, lack of data and insufficient links to civil society. This was followed by a regional consultation in Addis Ababa with representatives of national machineries. This training, she explained, is the first workshop and is aimed at linking gender machineries

with line ministries in planning and budgeting (finance) to gender sensitise planning and budgeting processes. The material developed will be translated to French and there will be training for the pilot Francophone countries next year. She indicated that there would be continuing activities as part of this project, including capacity building in gender-disaggregated data collection starting early next year and a leadership-training workshop.

Ms. Gemma Akilimali welcomed participants on behalf of TGNP. She noted that the primary resource of the workshop would be the participants' knowledge and resources. Ms. Ermelita Valdeavilla, Executive Director of the National Commission on the Role of Filipino Women and a member of the Regional Advisory Task Force of the Project, also welcomed the participants. She encouraged participants to draw inspiration from each other and to continue to enhance the bond between them, which was apparent from the onset of the workshop.

2.2 Visit to Tanzania Gender Networking Programme (TGNP)

The workshop included a field visit to the Tanzania Gender Networking Programme and its Gender Resource Centre in Dar es Salaam. This provided participants with the opportunity to learn more about the organisation's programs in gender training, advocacy and information dissemination. Participants expressed their appreciation of the comprehensive nature of the organisation, which included a Gender Training Institute, a gender-specialised library, and an advocacy programme, which, among other activities, addressed the issue of gender budgeting. The visit sparked a discussion on the relation between NGOs and the national machinery. In particular, it highlighted the positive role that NGOs could play in gender-sensitive planning and budgeting processes, including capacity building and serving as a watchdog to monitor the implementation of government commitments.

2.3 Expectations

Upon their return to the conference venue, participants outlined their expectations of the workshop, which are summarised as follows:

- Learn practical skills in gender-sensitive planning and budgeting,
- Enhanced capacity in developing tools and indicators for gender planning, budgeting and monitoring,
- Share strategies for addressing the challenges encountered in the mainstreaming process,
- Clarify the role of gender machineries and how they can aid other sectors in mainstreaming gender,
- Devise a national and regional plan for moving forward.

The facilitator compared the participants' expectations to the proposed objectives, which corresponded considerably. She also provided an overview of the timetable and methodology for participants.

2.3 Key Concepts in Gender Planning and Budgeting

The facilitator then asked participants to define a number of concepts including gender, gender equality, gender mainstreaming, gender bias, gender planning and gender

budgeting. Most participants demonstrated a strong grasp of the basic issues related to gender and development. After the discussion, Ms. Aggripina Mosha of TGNP provided an overview of the definition of each concept (see **Annex D**). The key issues, which emerged from the session, were the need to look at concerns of both men and women and to pay attention to the layers of marginalisation and disadvantage within social categories due to factors such as class, disability and age. Due to a history of male domination, the participants stressed the need for affirmative action programs to help "level the field" for women in development.

The facilitator also introduced the *Gender Equality & Women's Empowerment Framework*. This framework illustrates a hierarchy of steps to obtain gender equality and women's empowerment. The lowest rung is *Welfare*, which entails fulfilling basic needs. The next step is *Access*, which refers to providing mechanisms for groups to utilise opportunities such as training. Following is *Conscientisation*, which refers to the process of recognising structural inequalities; then *Participation*, which describes involvement in decision-making processes over key issues. The top of the hierarchy is *Control*, which refers to control over resources and decisions. The framework suggests that gender-planning programmes should utilise strategies appropriate for each level of the framework, building toward an ultimate objective of enabling marginalized groups to gain increased control over resources and decision-making. Multiple gender-sensitive interventions were suggested for each level.

2.4 Case Study on Gender-sensitive national planning and budgeting: Case studies of the Philippines and Tanzania

Ms. Ermellita Valdeavilla provided an overview of the gender mainstreaming process in the **Philippines**, which began in 1986 in response to findings on the disadvantaged status of women from the report "UN Decade for Women". The process began as a "women in development" strategy and was later transformed to a "gender-focused" process. She indicated that this process was assisted at the time by significant political and economic events, such as the election of the first female President of the Philippines. Although the President was not gender-sensitive, her ascent to power provided an opportunity to obtain government commitment in the improvement of the status of women.

The initial stages of the gender mainstreaming process in the Philippines focused on developing a plan for women and obtaining an Executive Order to institutionalise and legitimise the plan. The National Commission on the Role of Filipino Women used different strategies to ensure its passage and implementation, including collection of data and working closely with allies in government and NGOs. They also conducted an assessment, which was an important tool for evaluating their implementation progress and making necessary adjustments. Taking advantage of the Fourth World Conference on Women in Beijing in 1995, they developed a 30-year development plan for gender-responsive development as a strategic move to ensure the mainstreaming process extended beyond the term of one leader.

Ms. Valdeavilla provided an overview of the achievements of the process, including gender concerns have been institutionalised in parts of the national planning and

budgeting systems, various government agencies and sectors have developed Gender and Development (GAD) plans and budgets, and the National Machinery has strengthened its leadership capacities. She indicated that the National Machinery's interventions focused on planning, programming and budgeting, as well as implementation, monitoring and evaluation. Implementation is the most difficult aspect of this process because it involves working with many different sectors and agencies at the national and local level. Techniques of interventions involve content review, process diagnosis, technical assistance and capacity building.

She noted that supporting factors to this process included constructing a women's plan that provided a blueprint for what needs to be done and diagnosing the planning cycle process and the key entry points for intervention during the cycle. She emphasised the importance of building the capacities of the planners through provision of tools and training, backstopping when necessary, and rewarding performance. Other important factors included building alliances with other sectors and monitoring progress to ensure that commitments are honoured. She noted that as a co-ordinator, catalyst and technical resource, the national gender machinery plays a key role in this process (see **Annex E** for the full presentation).

Ms. Gemma Akilimali of the Tanzania Gender Networking Programme (TGNP) provided an overview of gender budgeting efforts in **Tanzania**. This began in 1997 as a civil society process, based on the recognition of the deteriorating economic situation in Tanzania, particularly in the areas of health, agriculture and education. This was due to a constraining macro-economic context, including globalisation, structural adjustment, liberalisation and the debt burden. As a result, the organisation began advocating for adoption by the government of a gender budgeting approach that stressed allocation and utilisation of government resources on the basis of gender needs of various social groups. They pointed to the government's commitments in various regional and international instruments to promote gender equality as a justification for such a process.

TGNP used various strategies to achieve its objectives, including coalition building; building alliances with various actors, including government, Parliament and media; conducting participatory action-oriented research in various sectors; and building an advocacy strategy. Key opportunities were identified, such as willingness of key government actors and on-going reforms of the budget process and expanded role of the local governments. This process led to the adoption of gender budgeting by the Government of Tanzania in a programme co-ordinated by the Ministry of Finance. The organisation has continued to support the mainstreaming process within the government through building capacities in gender planning and budgeting, developing tools and manuals, and providing backstopping services to government planners and budget officers. Ms. Akilimali stressed that the process should look at expenditure and revenue, allocation and utilisation, and ultimately, at the impact of the resources from a gender perspective. Entry points for gender mainstreaming should be identified and utilised (see **Annex E** for full presentation).

2.5 Principles of Gender Sensitive Planning and Budgeting

Ms. Agripina Mosha highlighted some of the key principles of gender budgeting.

These are summarised as follows:

- ⇒ *Motivation to act:* It is crucial for key actors to understand the issues involved and promote them within their respective arenas.
- ⇒ *Make an analysis of the political and social environment that is surrounding the government resource allocation:* assess key opportunities and constraints.
- ⇒ *Use national, regional and international policies to ensure these commitments are translated into domestic instruments.*
- ⇒ *Engender the national policies and planning* – the engendered national long-term goals, vision, policies and programmes are the basis for engendering national budgets.
- ⇒ *Identify supporters and key allies who are essential for the gender agenda*– there is a need to create a movement and involve stakeholders at various levels.
- ⇒ *Ensure adequate data and information to support the gender-mainstreaming process* – gender mainstreaming requires adequate gender-disaggregated data.
- ⇒ *Recognize the process of gender mainstreaming should be gradual but continuous:* be willing to encounter difficulties in the process and stay committed and focused onto the ultimate goal.
- ⇒ *Develop tools and capacity to mainstream gender:* these investments are particularly relevant for technocrats, as they are key for sustainability of the process and sustainability of the changes in planning and budgeting.
- ⇒ *Appreciate and acknowledge success and use it as a springboard to further change:* For example, statements within the budgets or by national officials can be used as advocacy tools for advancing the mainstreaming process.
- ⇒ *Identify and use strategic entry points* within the planning cycle, the line Ministries and institutions. One of the entry points could be the programme or project appraisal process.
- ⇒ *Take stock of external factors and use them* to influence budget allocation– the external macro-economic environment often has direct impacts on national resource allocation; be aware of the factors and use them;
- ⇒ *Monitor the process* – develop indicators to evaluate the success and impact of the mainstreaming process.
- ⇒ *Emphasise the importance of openness and transparency in the planning and budgeting processes*–this includes advocate for mechanisms to eliminate corruption and leakages in order to ensure the proper usage of allocated funding.
- ⇒ *Strengthen accountability mechanisms for mainstreaming gender:* make sure that roles in the mainstreaming process is clear and that there are mechanisms available to make relevant actors for mainstreaming gender.
- ⇒ *Ensure that gender is a priority within plans and budgets* – Otherwise, gender issues will be the first affected when resources are cut.

2.6 Country Working Groups on Application of the Principles

Participants were then grouped by country with the following assignment:

- Identify the principles that are most beneficial to improving the country's gender mainstreaming strategy,
- Identify what could be done to strengthen the application of these principles, and
- Identify the roles of the gender machinery in strengthening the implementation of this process.

The participants highlighted the following as key areas of activities where they could apply the principles identified in the working groups:

- Obtain commitment and motivate key government leaders,
- Implement national gender policies, including translating international commitments into national/local ones,
- Develop tools in building capacities of various actors, particularly technocrats,
- Develop systems and tools to collect, analyse and maintain gender-disaggregated data, e.g. creating a databank, and
- Develop monitoring systems and indicators.

The main roles of the gender machinery were identified as co-ordination, capacity building, advocacy and monitoring. Most countries acknowledged that there was a need to strengthen the role of the national machinery for women and the gender focal points to oversee the mainstreaming process (See *Country Working Group Reports on Principles of Gender Sensitive Budgeting*, **Annex F**).

2.7 Country Best Practices in Gender Mainstreaming Planning and Budgeting

Participants then presented on the best practices in their respective countries in relation to gender-sensitive planning and budgeting (See *Country Reports on Best Practices*, **Annex G**). These were summarised by the facilitator as follows:

- Development of strong national structures, with adequate human and financial resources for operationalizing gender mainstreaming. The structures include the National Machinery, and gender focal points in various government sectors, with the support from civil society and the private sector. It should be located strategically where it can closely participate in planning and budgeting processes at each level, and it should have the mandate for it to do so.
- The National Machinery should focus on policy analysis, lobbying and advocacy, coordination and mainstreaming of gender and conduct activities such as the:
 - Creation of a National Women/Gender Policy with implementation structures and an action plan.
 - Advocacy to engender government sectoral policies;
 - Establishment of structures and linkages with other Ministries and NGOs for feedback and mobilization;
 - Lobbying for commitment of relevant policymakers and leaders to gender sensitive action on emerging issues;

- Creation of structures for continuity of gender initiatives – establish monitoring and evaluation mechanisms on gender programmes;
- Training of key actors in planning and budgeting through training of trainers;
- Development and utilisation of tools to guide the process of gender mainstreaming, including, among others, provision by the Ministry of Planning/Finance of gender-sensitive budget guidelines for line Ministries;
- Dissemination of information for policymakers and the general public on the status of gender and the provision of examples of discrimination and the impact of cultural practices;
- Working to repeal/amend gender-biased laws;
- Co-ordination of the collection of gender-disaggregated quantitative and qualitative data;
- Lobbying for priority be given to gender issues and programmes for resource allocation. Government commitments to gender equality should be reflected by the resources allocated to the Gender Machinery;
- Building linkage with key sources of expertise outside of the gender machinery.

Most of the groups acknowledged that, while some progress had been made, there were many gaps. In particular, they highlighted the limited resources allocated to the national machinery for the advancement of women. They pointed out that governments' stated commitments to gender equality in most cases do not match the resources allocated for gender issues and the gender mainstreaming processes. The case study of Malawi, which is detailed in the Annex, demonstrated how a gender machinery could effectively lobby for more resource allocation and act as an advocate for gender mainstreaming within the government

2.8 Intra-disciplinary working groups

Participants were then divided into groups based on discipline (finance, planning and gender) with the following assignment:

- Identify issues, opportunities and constraints that are essential for their Ministry, and
- Devise recommendations to address the constraints and take advantage of opportunities.

Many of the issues highlighted by the groups focused on the lack of institutionalisation of gender mainstreaming within planning and budgetary processes as well as a lack of know-how in this area. Therefore, the recommendations focused on policy guidance frameworks, structures, capacity building, and tools development (see *Intra-Disciplinary Working Groups*, **Annex H**).

The facilitator highlighted a number of key areas for training that are particularly relevant for the gender machinery but also apply to staff, particularly gender focal points, in finance and planning sectors. These include:

- Policy and programme analysis skills,
- Programming skills in relation to structures, programmes and a human rights approach,
- Monitoring and evaluation,
- Information generation, packaging and dissemination, including documentation of achievements and lessons learned,
- Lobbying and advocacy,
- Assertiveness,
- Team building and organising skills, and
- Information technology.

The facilitator also highlighted the following skills as being particularly relevant for staff in finance ministries:

- Analysing of stakeholders;
- Gender budgeting, reporting, performance monitoring and evaluation; and
- Prioritising and negotiation skills.

Staff in planning ministries was encouraged to develop skills in:

- Gender-sensitive contextual analysis,
- Gender-sensitive policy making and planning

These skills can be acquired through organised training, documentation review, and on-the-job practice and training.

2.9 Sharing of basic tools for gender review of national planning and budgeting

Ms. Valdeavilla then provided an overview of gender-sensitive planning, outlining the rationale of gender planning and basic questions to be asked at each stage of the planning process. She emphasised that planning is not gender neutral and that a gender review of a plan is likely to lead to more relevant and appropriate solutions. She described indicators for how to recognise if a plan is gender-sensitive, including whether gender was incorporated as a core value, if it utilises a gender-sensitive language and process, and whether gender measures are prioritised in the strategies and resource allocation. Within the planning process, she emphasised the importance of women's representation in decision-making processes and feedback mechanisms.

She then provided a list of questions to ask when reviewing the content of a plan. She advised consulting with the gender machinery and looking at each stage of the process, including analysis, objectives, targets, programmes/strategies and indicators from a gender perspective. She reminded participants to invest in gender capacity building and in gender-disaggregated data collection and analysis. She stressed that the participants

should ensure that bias against women is removed and that steps are taken to avert backlashes (see *Sharing of Basic Tool*, **Annex I**).

Ms. Akilimali then shared basic steps for gender budgeting and a list of questions to raise at each stage. All stages of the budget should be analysed from a gender perspective. This involves engendering the national goals and policies of the country and ensuring that they reflect strategies to address the gender needs of various groups in society, men and women, girls and boys. The national budget guidelines should also be engendered. When examining the budget, it is important to conduct an environmental scan from a gender perspective and look at what is happening within the sector, the decision-making processes, and among the stakeholders from a gender perspective. This process requires identifying the strengths, weaknesses, opportunities and pitfalls of the budgetary process in a gender-sensitive manner. Furthermore, it is essential to have gender-disaggregated data.

When planning and allocating resources for national programmes, it is vital to ensure that resources for capacity building for gender machineries are included. The national plans and budgets should also have gender-sensitive targets; focused on ensuring that the resources are used in a manner that has positive impact on gender equity and equality. The budgets should be monitored and evaluated to ensure that the resources allocated reach their intended targets and documentation of achievements and lessons learned should be collected in the process (See *Sharing of Tool*, **Annex I**).

2.10 Country Working Groups to Develop Action Plan for Mainstreaming Gender in Planning and Budgeting

Based on these presentations, participants then returned to their country groups to develop strategies to operationalise gender mainstreaming and budgeting in their respective countries. Their assignments were as follows:

1. Identify the issues that are most relevant to your country and strategies for addressing these issues;
2. Identify the roles and responsibilities of your team in adopting those strategies, and
3. Create indicators for measuring the success of these gender-mainstreaming processes.

The country presentations illustrated a number of issues and strategies that were relevant to their particular countries. Capacity building played a central role in the majority of strategies developed. The main strategies developed were as follows:

- Strengthening the co-ordinating role of the National Machinery and the sectoral focal points,
- Writing/revising National Gender Policies and engendered sectoral policies,
- Influencing budget guidelines,
- Strengthening linkages with civil society,
- Lobbying for increased resources – human and financial – to the NM,

- Planning for gender mainstreaming, including a capacity building plan and a plan for development of tools,
- Influencing planning and budgeting processes at all stages,
- Strengthening sectoral focal points, and
- Engendering on-going reform processes, e.g. MTEF and PRSP.

The groups also worked on developing indicators for measuring the success of the gender mainstreaming process. The suggested areas of measurement included the following:

- Number of trainings, staff, etc.
- Establishment of structures
- Capacities developed
- Tools in place
- Empowerment of National Machinery
- Engendered policies

(See *Country Working Groups to Develop Action Plan*, **Annex J**).

A discussion ensued on how to develop a measurable indicator for each area, for example, measuring the empowerment of the gender machinery. It was pointed out that qualitative measures can be used which assess how active the gender machinery is in, coordinating the gender mainstreaming processes, instituting and revising policies and guidelines, implementing capacity building, and developing tools. Empowerment requires assertiveness and negotiation skills, which can be measured. Participants were encouraged to also consider the development of impact indicators in addition to the process indicators developed.

Section 3: Country Action Plans

3.1 Development of Immediate Follow-up Action Plans by Country

Participants then worked in groups to discuss immediate follow-up action plans by country to mainstream gender in the national plans and budgets. The participants were given the following objectives for their action plans:

1. Reporting to their Ministries on the workshop;
2. Strengthen networking and linkages among themselves as well as with sectoral gender focal points and civil society;
3. Building relevant capacities as indicated in paragraph 2.8;
4. To identify gender gaps in national plans and budgets;
5. Build linkages with gender machineries in their sub-region.

The participants provided an overview of their immediate action plans. Most groups developed very specific plans of what to do within the next two months to advance gender planning and budgeting, including the country participants meeting as a group, writing a country-specific report, briefing other key actors in their respective Ministries and continuing networking with participants in the workshop from other countries. Many of the groups identified Ministers, Permanent Secretaries, and planners as key target groups for reporting on the workshop. In addition, they developed medium-term plans

for building capacity in gender mainstreaming, strengthening the gender machinery, developing tools in gender mainstreaming, and steps to take in influencing policies, plans and guidelines towards more gender-sensitive. The presentations demonstrated that the participants worked well as partners, taking ownership of and successfully utilising the skills taught in the workshop (see *Country Immediate Action Plans, Annex K*).

One of the strategies mentioned by the groups was capacity building. The facilitator acknowledged that capacity building is a key process, as the concept of gender planning and budgeting is still a new concept as are gender machineries. She suggested that, when external consultants are used to facilitate capacity building, the consultants' terms of reference should include a training of local trainers portion, so that the gender machinery could ensure that the impact be sustainable. She also recommended establishing strong linkages with a broad base of NGOs and CBOs as well as gender-related institutes as they can be positive allies in the gender movement. She appreciated the enthusiasm demonstrated by the male members of the workshop for proposing the action plan and encouraged them to continue in this spirit in the plan's implementation. The facilitator also highlighted one of the participant's proposals, a study tour to other countries, as a very positive learning tool to national gender planning and budgeting processes in other countries.

Participants were also encouraged to review the plans they developed at the workshop and ensure that they are practical and implementable. They were also advised to continue linking with other workshop participants from various countries and sharing successes and challenges, as this partnership could provide a useful perspective to their work at the national level. Furthermore, it was pointed out that the issue of culture is a key issue to consider in this process, as it continues to be a barrier to gender equality in some countries. Finally, the facilitator encouraged participants to continue to demonstrate their resolve to work towards gender mainstreaming of policies, plans and budgets and not be discouraged when facing obstacles. The facilitators commended the participants for their enthusiasm and said they looked forward to the continuing in partnership with them to advance the cause of gender equality in their respective countries.

3.2 Developing a Regional Strategy

The facilitator then conducted a plenary session on the development of a regional strategy to support national-level processes on gender planning and budgeting. Based on her inputs and the comments from the participants, the main areas for such a strategy were as follows:

- ⇒ Regional information/ expertise
 - Support of training – long-term training programme for national machineries on gender mainstreaming (by DAW)
 - Specific expertise – consultants from outside the country –e.g. TGNP, Philippines
 - Building the capacity of institutes within the region to support national capacity building processes
 - Development of manual that can be adapted at the national-level (by DAW)

- Study/ training tours, particularly by high level officials from the respective Ministries, to study best practices in other countries: touching place with the sectors where gender mainstreaming is being done.
- ⇒ Networking and linkages
- Communication via e-mail, phone, and fax
 - Sharing of information, achievements and challenges on an on-going basis.
- ⇒ Financial assistance
- Linkages by DAW to donor support

Ms. Tsu-Wei Chang of DAW thanked the participants and facilitators for their input in the development of a regional strategy. In responding to the participants' request for support by DAW, she explained that DAW is not a donor agency, therefore could not provide funding for the proposed activities. However, some of the activities the participants proposed are already programmed in an on-going project to support gender machinery. In particular, there is an activity that is in progress to survey available training institutions in the region, of which the preliminary findings were included in the participants' documentation. DAW would welcome input into this survey from participants to enhance the database.

In addition, DAW has an activity on gender disaggregated data collection and analysis which aims to build the capacity of the national machineries to the use of the data to further their work to follow-up the Beijing Platform for Action. In-country training workshops are planned next year to be conducted by a team of trainers with expertise on gender analysis and statistics. She indicated that though there are data existing locally, the gender machinery might not have the resources to collect and analyse them. To alleviate the resource constraint, she suggested that national machineries could link up with local universities to develop relevant research projects to be carried out by the students. Ms. Chang also shared that DAW plans to conduct a leadership training next year. The modalities of such training will be worked out and will depend on the inputs from national machinery, but will include skills in assertiveness, networking, and negotiation.

In addition, a training of trainer's manual may be developed based on the material from this workshop, which can be adapted and used at the national level. She also suggested that national machineries could prepare a briefing package including a short presentation providing the rationale for gender-sensitive planning and budgeting. In relation to the idea of bringing regional experts to support local processes, she stated that the United Nations encourages the South-South cooperation. In terms of assisting the linkage between participating countries to donor partners for securing funding for project proposals, she explained that some donors were invited to this workshop but were not able to attend. However, the report will be circulated to donor agencies. She advised participants to concentrate first on creating a good proposal and then the resource mobilisation process will follow.

3.3 Conclusion and Closing

The facilitator compared the objectives of the workshop to the original objectives. In terms of strengthening/ developing conceptual understanding and skills of key government officials in gender-sensitive planning and budgeting, participants felt that this had been achieved to a large degree. Country-specific immediate action plans for engendering national plans and budgets were developed. As regards to developing a regional strategy, this was discussed but will need to be further concretised in the future based on input obtained on the strategy at the national level.

During the conclusion session, Ms. Christine Warioba, Programme Officer for Gender at the SADC Secretariat, provided some insights to participants. She appreciated that this project had begun and that two members of the SADC Member States were participating, as this provides an opportunity to build capacity and share experiences with other countries. At the regional level, SADC's main task is to co-ordinate and monitor the progress being made at the national level to implement regional and international commitments to the advancement of women. She informed the participants that the SADC Declaration on Gender and Development was developed based on the priority areas identified by SADC Member States, and SADC Member States signed it in 1997 along with an Addendum on Violence Against Women signed in 1998.

Ms. Warioba acknowledged that gender machineries are key to the domestication of international commitments but that they are often under-resourced, with low capacity, meaning that they are often not able to effectively implement their mandate to address gender equality issues. Although most line Ministries has the mandate to mainstream gender into their respective ministries, they require tapping gender expertise from their gender ministry. Therefore, there is a great need to build the gender machinery's capacity to fulfil these demands. She commended DAW for this project, as it aims to assist gender machinery to more effectively conduct their role. She also suggested that DAW continue to link gender machineries with the central ministries of finance and planning in order to help them enhance gender mainstreaming in planning and budgeting. She encouraged the three SADC Member States who had participated in the training to continue to link between them, to share experiences between them, as well as with other SADC Member States who were not selected as pilot countries under this DAW project.

Ms. Chang thanked participants for their interest and focus during the workshop. She celebrated that there was nearly 50/50 representation of men and women, which is very unusual for a gender workshop and a very encouraging sign. She thanked the co-operating institute, TGNP, for their excellent work. She appreciated the commitment of the organisation and the positive energy to achieve the goal. She pledged to continue to enhance the linkage and partnership.

On behalf of the participants, Dr. Mary Shaw of Malawi thanked the UN for organising the workshop. She expressed that participants feel privileged that their countries were selected as pilot countries. They pledged to do the best they can to succeed, but asked that the UN do the best they can to respond to their request. This training has encouraged and motivated them but also awakened to the existing gaps and created recognition of the

fact that they will need further support. On behalf of the participants, she pledged that they would work to ensure that all of the plans and budgets in the respective countries were engendered in the next 5 years, which is an achievement that both the UN and SADC would have played a part.

SECTION 4: EVALUATION AND CONCLUSION

4.1 Evaluation

Evaluation of the workshop was conducted in three major ways:

- a) Requesting the participants to respond to pre- and post-workshop assessments, which tested their familiarity and skills in gender planning and budgeting;
- b) Requesting the participants to fill a daily ‘mood meter,’ which asked them to reflect on their level of satisfaction with various aspects of the workshop; and
- c) At the end of the workshop, reviewing with the participants the objectives of the workshop and discussing the degree to which they had been met.

On the whole, all of these mechanisms for evaluation of the workshop demonstrated that the workshop objectives had been met to a great extent and the participants were satisfied with the way the workshop was facilitated. The first major objective of the workshop was to strengthen/ develop conceptual understanding and skills of key government officials in gender-sensitive planning and budgeting. The pre- and post-workshop assessments reveal that the level of understanding and ability to defend gender-sensitive planning and budgeting increased during the course of the workshop. Before the workshop, the majority of the participants who responded had a fair level of understanding about gender budgeting (14/22) and an average ability (12/22) to defend. After the workshop, the majority of participants responding were good in both regards (10/19 and 11/19, respectively). (See *Summary of Evaluation Responses*, **Annex L**).

The second major objective of the workshop was to identify opportunities and challenges for effective gender-responsive planning and budgeting. At the end of the workshop, the participants concluded that this had been achieved to a great extent, particularly during the intra-disciplinary working groups (see **Annex H**). The next major objective related to the development of country-specific action plans for engendering planning and budgeting. The participants also agreed that this had been achieved, through the development of action plans for gender planning and budgeting (see **Annex J**) and the development of immediate follow-up action plans (see **Annex K**) at the country level. By the end of the session, all of the participants responding to the post-workshop assessment indicated readiness to influence for engendering of national planning and budgeting processes, which was an increase from the beginning of the workshop. The final objective was to develop a sub-regional strategy for operationalising gender-sensitive national planning. Again the consensus of the participants was that this had been done in the final plenary session, with a series of recommendations generated for future action (See section 3.2).

In terms of the organising and facilitation of the workshop, participants were also generally satisfied. On all three days, they gave high marks (an average of between 2.6 to 2.8) to the topic of the day, the group work, and the plenary discussions. They also gave a high ranking to the extent to which their expectations had been addressed (between 2.5 to 2.6). Participants in particular commended the Philippines and Tanzania case studies and presentations as useful experiences. There were a few concerns expressed about the logistics and administration of the workshop (see **Annex L**).

4.2 Conclusion

In general, as a pilot workshop, the training was very successful. The participants were the targeted audience, with most of them holding decision-making position in their respective ministries of Finance, Gender, and Planning. What was remarkable about the workshop attendance was that nearly half of the participants were men. What was even more remarkable was the degree of enthusiasm for gender planning and budgeting between both the men and women participants. The overwhelming sense throughout the course of the workshop is that participants had experience and exposure to the concept of gender, had accepted it as relevant to their work, and was hungry for practical skills and tools to mainstream gender into their respective positions.

The facilitation of the workshop was also a success story. The team of facilitators from DAW, TGNP and the Philippines each brought their own expertise to the training, creating a broad base of knowledge to draw upon in the areas of gender planning and budgeting. The team also, despite only knowing each other for a few days, were able to work very well together and interchanged roles with ease. The methodology of the workshop, which combined practical and visual presentations, plenary discussions, and group work also proved to be useful. A gap cited by the participants was the need to improve upon the handouts provided, but the rich information generated from this workshop provides a valuable starting point for the development of materials.

As major action plans emerging from the workshop were at the national level, all countries pledged to return home, report back immediately to their respective directors, departments, and Ministries and initiate immediate next steps to mainstream gender into planning and budgeting. Their enthusiastic responses to the post-workshop assessment indicate the degree to which they were inspired by the workshop. Responses to the question *‘Do you attempt to influence the planning and budgeting process for gender sensitiveness?’* Included: ‘I will now after the training’, ‘Yes. I am going to jump into the sea to practice – practice makes perfect’ and ‘After this workshop, I promise to use all of the tools available and at my disposal to influence planning and budgeting processes for gender sensitivity.’ All of the countries indicated that further building of capacity in gender mainstreaming planning and budgeting and the development of practical tools to do so were vital. In the country action plans, the participants listed the conducting of trainings and development of tools among their priority. They also asked for outside assistance, both from the region, and DAW in particular, in this process.