



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

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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,

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-

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

2.5 Principles of Gender Sensitive Planning and Budgeting

Ms. Aggripina 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

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

for building capacity in gender mainstreaming, strengthening the gender machinery,

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

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.