



REPUBLIC OF UGANDA
MINISTRY OF EDUCATION AND SPORTS

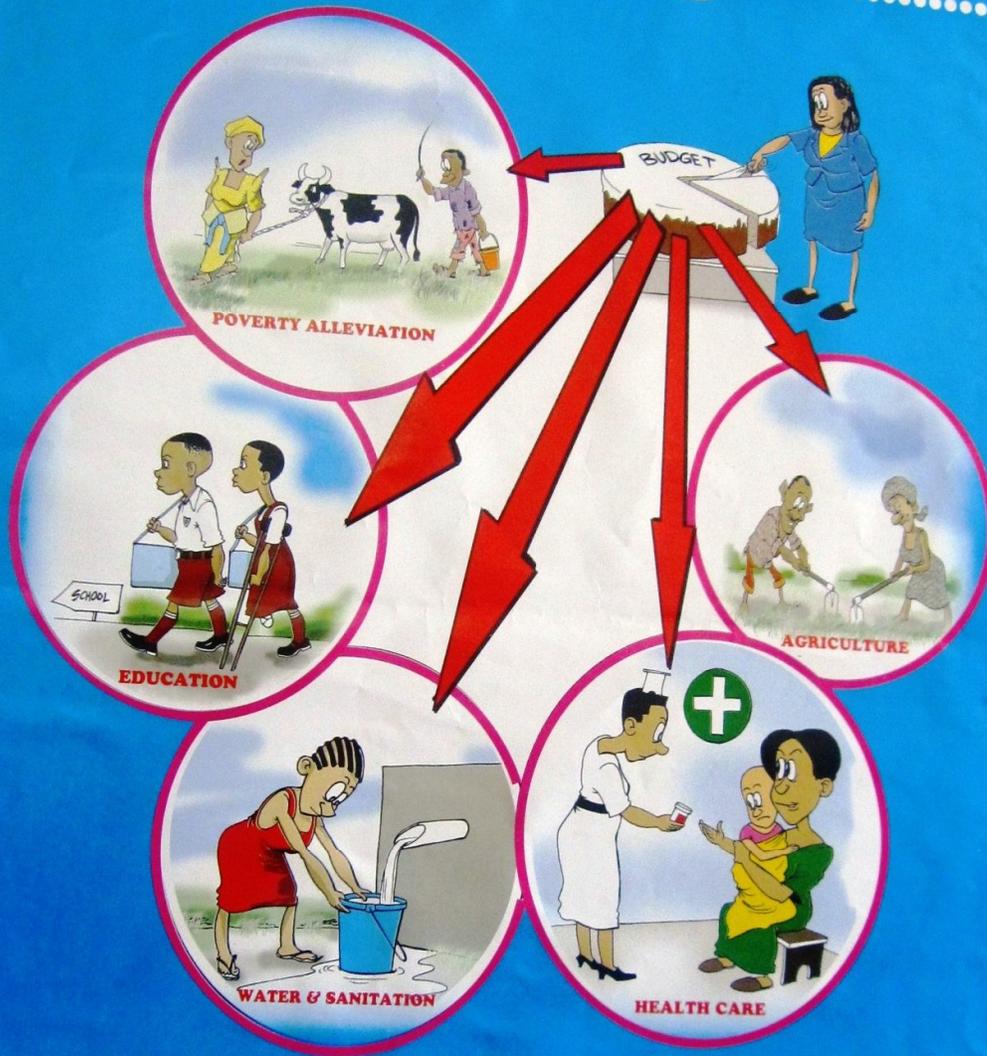
**SIMPLIFIED GENDER BUDGETING GUIDELINES FOR
MAINSTREAMING GENDER IN EDUCATION SECTOR
BUDGET FRAMEWORK PAPERS**



Gender Unit

2013

A Good Budget.....



addresses the needs of women & men equitably



Forum for Women in Democracy (FOWODE), P. O. Box 7176, Kampala, Uganda, Email: fowode@utlonline.co.ug

ABBREVIATIONS

AIDS	ACQUIRED IMMUNE DEFICIENCY SYNDROME
BFP	BUDGET FRAMEWORK PAPER
GRB	GENDER RESPONSIVE BUDGETING
MDGs	MILLENNIUM DEVELOPMENT GOALS
PWDs	PEOPLE WITH DISABILITIES
HIV	HUMAN IMMUNE -DEFICIENCY VIRUS
GTF	GENDER TASK FORCE
GDD	GENDER DISAGGREGATED DATA

Definitions of Key Concepts

Gender refers to the socially and culturally constructed roles, responsibilities, relations and entitlements between men and women.

Gender concern/Issues: arise where an instance of gender inequality is recognised as unjust. The fact that women have a higher rate of illiteracy than men is a gender concern and would need to be taken into account in a project that requires literacy skills.

Gender Equity refers to fairness and justice in the distribution of benefits and responsibilities between men and women, boys and girls. Promoting gender equity in budgets ensures that budget allocation is fair to the needs, roles and responsibilities of men and women, boys and girls.

Gender equality means that there is no discrimination on the grounds of a person's sex in the allocation of resources.

Gender Inequality is results of different forms of discrimination on the grounds of a person's sex in regard to benefits, responsibilities and opportunities. As long as budgets do not take into consideration the differences in the gender roles and

responsibilities, gender needs, interests and opportunities, they become tools of perpetuating the gender inequalities.

Gender disaggregated data: relates to the collection and analysis of results by gender i.e. data on social status and socio/economic roles of men and women or data based on the biological characteristics of men and women.

Gender Mainstreaming: a process of identifying, taking full account of integrating the needs and interests of women and men into policies, strategies, programmes and administrative and financial activities.

1.0 WHAT IS GENDER BUDGETING

Gender budgeting is a practice/ approach of allocating resources taking into consideration the different needs, interests and constraints of women and men. It also involves disaggregating and analyzing government expenditures and revenues according to their different impacts on different categories of women and men, boys and girls. Gender budgeting involves an analysis and understanding of the situation of different categories of men and women, boys and girls to determine the gender gaps/inequalities and setting

appropriate interventions in all development plans and budgets to address them.

The key guiding questions for gender budgeting include;

1. What is the current situation of men, women, boys and girls in terms of benefits, needs, interests, and constraints?
2. Are women and men's, boys' and girls' needs, interests and constraints equally addressed? Who benefits and how?
3. What hinders or constrains women, men, boys or girls from accessing or benefiting from the set interventions?
4. What interventions can be undertaken to address the constraints?
5. Have adequate resources been allocated for the planned interventions to address the gender gaps?
6. Do the proposed development plans or any other programmes reduce, leave unchanged or widen the prevailing gender gaps?
7. Is the quality of services assessed in ways that take into account the needs and interests of and constraints faced by women, men, boys, and girls and disadvantaged groups?

1.1 Importance of gender budgeting

Gender Budgeting is important and relevant to the education sector in various ways;

- It assists to promote equity, equality, efficiency and transparency in the budget process including the realization of social, economic and cultural rights and good governance.
- Gender budgeting offers a practical way of evaluating the sectors' inaction or action and the progress made towards gender equality by focusing on the weight of government's financial commitment attached programmes and their impact on the lives of boys and girls.
- Use the budget as a tool to consciously ensure that the sector and her sub sectors focus on marginalized and disadvantaged groups such as , youth, people with disabilities (PWDs) and people living with HIV/AIDS.
- Enhancing the linkages between economic and social policy outcomes;
- Tracking public expenditure against gender and development policy commitments;
- Contributing to the attainment of the Millennium Development Goals (MDGs) (Budlender *et al.*, 2002:12).

1.3 Talking points for gender responsive budgets

Why get involved in GRB initiatives?

- *The budget is the most important policy of government because, without money, government cannot implement any other policy successfully.*
- *A Gender Responsive Budget ensures that the needs and interests of individuals from different social groups are covered in the government budget. In particular, it ensures that the needs and interests of women, men, girls and boys are covered.*
- *Looking at budgets through a gender lens shows clearly where the collection and distribution of public money is unequal and inefficient. It shows how discrimination affects national development.*

2.0 GENDER BUDGETING GUIDELINES

2.1 Why the guidelines

The Gender Task Force (GTF) Members identified the lack of adequate skills to promote gender budgeting among the key actors as one of the constraints on gender mainstreaming for the departments in the sector. This results into budgets that are not adequately responding to the needs, constraints and interests of men and women, boys and girls and the

disadvantaged groups. Therefore, the gender budgeting guidelines have been designed to help the sector staff involved in the process of planning and budgeting in recognizing and addressing gender in their plans and budgets.

2.2 Aim and objectives of the guidelines

The overall aim of these guidelines is to provide a guiding framework for the sub sectors and staff to undertake gender budgeting during their budgeting process so as to formulate and implement budgets that address the needs, interests of and constraints faced by men and women, boys and girls.

The specific objectives are;

1. To provide a common understanding of gender budgeting among sector and sub sector staff;
2. To guide the development and implementation of initiatives/ interventions that promote gender equality;
3. To provide key steps and procedures that can be undertaken at the sector/sub- sector level to institutionalise gender budgeting;
4. To provide some guidelines on how to assess BFPs for their impact on the different categories of men and women, boys and girls;
5. To measure the progress made by the sector and sub - sectors in translating their policy commitments on gender

equality into concrete actions for the benefit of men and women, boys and girls.

2.3 Who should use the guidelines

- All Heads of Departments
- All Planners
- All sub-sector budget officers
- All sub-sector gender focal point officers

3.0 ALIGNMENT OF GENDER BUDGETING STEPS TO THE BUDGET CYCLE

The purpose of aligning gender budgeting with the budget cycle is to assist the budget stakeholders to have a clear understanding of how the above steps fit within the budget cycle. For consistency one should ask the question of when should gender issues can be incorporated into the budget?

The following highlights how the gender budgeting steps are interlinked with the stages of the budget cycle:

Planning (budget preparation): at the beginning of the budget cycle there should be a gender diagnosis of the sector. In other words, based on the knowldege of the current gender situation, the sector/subsector should ensure that specific activities,

projects, programmes and resources to address clear and precise gender inequalities are planned for.

Budget adoption (budget voting): before voting the budget, staff should ensure that a gender analysis of the budget priorities is conducted. This analysis should illustrate the implications of budget policy and allocations on women, men, girls and boys in order to determine the potential differential impact of the budget.

Budget execution (budget monitoring): the planning and budget staff of the sector/sub sector should monitor the budget execution and analyse its effects on men and women, girls and boys periodically as will be agreed.

4.0 HOW TO MAINSTREAM GENDER AND EQUITY ISSUES IN THE BUDGET FRAMEWORK PAPERS(BFPs): STEP BY STEP SIMPLIFIED GUIDE

To address gender and equity issues planners and budget focal points should do the following;

Step 1: List key sector/sub sector objectives for the period.

Step 2: Prioritise at least three (3) gender and equity issues identified for the sector\sub-sector

- 1 The sector/ sub sector staff should have conducted a situational analysis and generate Gender Disaggregated Data (GDD) about the areas of focus. This is to assist in making informed decisions during programming. Understanding the situation at hand, the most important priority needs, concerns and issues that need attention, provide guidance identification of appropriate interventions.
- 2 Analyse the previous/on-going interventions to ascertain who is benefiting and the constraints that may hinder females and males, boys and girls from accessing the benefits of the interventions as well as the gender gaps.
- 3 Articulate or define the key gender issues for each of the core programme areas.

At this stage the key questions that should be addressed include among others;

- What is the current situation of men, women, boys and girls, children, youth and PWDs in terms of benefits, needs, interests, and constraints?
- Are women and men's needs, interests and constraints equally addressed by the ongoing programmes? Who benefits and how?

- What hinders or constrains women, men, boys or girls from accessing or benefiting from the on going programme/interventions?
- What changes can be introduced in the on-going programmes to improve the situation of the different categories of females and males?
- What interventions can be undertaken to address the constraints?

Responses to the above guiding questions promote a better understanding of the situation and provide information for decision-making.

4 Set gender specific objectives especially where wide gender gaps are identified. Some of the questions at this stage will be

- How will this objective/proposed programme affect the gender and equity issues we have listed?
- Will this objective/proposed programme improve, worsen or maintain the status quo of the most disadvantaged and socially excluded groups?

- In what ways can the objective/ proposed programme be improved so that it improves the situation of the disadvantaged groups?

Step 3: Identify sector objectives that can address the identified gender and equity issues:

- Propose interventions as per the ranked problems; appraise the interventions to check whether they address the gender gaps.

Step 4: Identify gaps in addressing gender and equity issues by the sector/ sub- sector

- From the priority issues in **step 2**. Identify which ones will not be addressed by any sector/sub-sector objectives.
- The fall outs are gaps.
- The gaps are the differences between what the sector objectives will achieve in terms of addressing the identified gender and equity issues and what actually needs to be done to effectively handle the issues.
- Identify the stakeholders to address the gaps.

Step 5: Cost the activities and allocate funds/resources to ensure their implementation

Step 6: Determine output indicators, performance indicators and outcome indicators.

The sector/sub-sector should develop indicators to measure changes in the situation of women, men, boys and girls. The staff should note changes planned in the coming year, to assess whether the budget is becoming more or less gender responsive. To enable assessment from a gender and equity perspective, the proposed performance indicators must be disaggregated to cover key gender and equity aspects of programmes.

Annex 1: Examples of gender and equity issues in the Education Sector projects and programme



Gender issues in Basic and Primary Education

- Equal access and participation rates to school for girls and boys in various social groups
- Availability of facilities (separate toilets, dormitories etc) needed to improve girls' access to schools
- Improvement in retention of girls and boys
- Inadequate female teachers at various educational levels to act as role models;
- Poor quality and relevance of teaching/training
- Limited women involvement in school management
- Lack of support services such as counselling and health services to address inter-sectoral factors that affect girls participation in education
- Inaccessibility of opportunities for training or scholarship for both girls and boys

Gender issues in secondary education

- Improved awareness of existing education and training opportunities for girls in all available programmes
- Increased availability of secondary education offered in rural communities
- Improved facilities at secondary training institutions (e.g. secure women's dormitory accommodation, study facilities for women where sex aggregation is a cultural norm) to allow women to enrol.

- Increased training, recruitment and retention of female teachers at this level



Gender issues in BTVET

- Promotion of female participation in BTVET
- Improvement of hostel facilities for girls in BTVET institutions
- Increasing the share of female instructors in the BTVET system
- Promotion of access of disadvantaged target groups to relevant BTVET offers

- Courses or training sessions held in locations that are inaccessible to females as well as males, considering cultural norms and women's mobility?
- Arrangements for scholarships/bursaries and other special arrangements to ensure female participation.

REFERENCES

MINISTRY of Finance Planning and Economic Development(2011) , How to prepare a budget framework paper that addresses gender and equity issues. (July2011)

Ministry of finance, planning and economic development(2007)
Budgeting for gender equity: A manual for facilitation, March 2007.

FOWODE(2010), Advocating for equitable distribution of resources March 2010