• GENDER-RESPONSIVE
• PLANNING, BUDGETING, MONITORING, EVALUATION
• & GENDER AUDITING

Second PME Forum
4-5 October 2018
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Background and introduction

• Despite advances, majority of women and girls
  – still subject to poverty, unemployment, inequality, gender discrimination, gender-based violence and many other social problems
  – face economic, social and political exclusion

• Triple challenge of multi-dimensional poverty, inequality and unemployment which has direct, negative impact on women and entrenches women’s powerlessness and gender inequality
  – 41.7% of females live below lower-bound poverty line (2015),
  – Black African women worst affected by poverty and unemployment
Inequality and deprivation based on race, class, gender, spatial location etc.

- women not homogenous

Unpaid care work key source of gender inequality

Women’s exclusion from mainstream economy and lack of access economic opportunities underpinned by

- Patriarchy and unequal gender relations
- Legacy of racial oppression and marginalisation
- Unequal access to, ownership and control of the economy and productive resources, including land
Background and introduction

• Why Gender-Responsive Policy, Planning, Budgeting, Monitoring, Evaluation and Auditing?
  – To achieve Constitutional vision of non-sexist society and achievement of gender equality
  – To ensure women’s empowerment & gender equality (WEGE) at centre of public policy, planning and budgeting
  – To ensure allocation of adequate resources for WEGE
  – Linked to
    • Institutionalization of gender mainstreaming across state machinery
    • broader political and socio-economic transformation agenda
    • Outcomes and results-based approach
    • Govt-wide policy, planning and prioritization
    • Broader public finance and budget reforms
Background and introduction

- Around 100 countries globally implementing GRPB initiatives, incl. in Africa (Uganda, Rwanda etc.) India, China etc.
- SA previously leading on GRB on the continent but regressed
- Minister in the Presidency responsible for Women and Dept of Women have more recently been driving the process forward in partnership with DPME and National Treasury

Need for major paradigm shift
MOW/ DOW Mandate

• DOW responsible for leading and coordinating the fulfillment of South Africa’s mandate to realise gender equality and the empowerment of women and girls and their full & equal enjoyment of all human rights and fundamental freedoms
  – Located in Presidency as engine of govt-wide approach
  – Minister in Presidency responsible for women reports to President

• Mandate derives from multiple instruments at global, regional and national level, including the following
  – SDGs Agenda 2030, Beijing, CEDAW etc.
  – Agenda 2063, AU Gender Strategy, Solemn Declaration etc.
  – SADC Gender and Development Protocol
  – NDP 2030 & SA Policy Framework on WEGE
(e) Restructure and target the allocation of public expenditures to promote women's economic opportunities and equal access to productive resources and to address the basic social, educational and health needs of women, particularly those living in poverty;
Mandate

- DPME & DOW location within Presidency provides unique opportunity to collaborate on:
  - Building a gender responsive planning, budgeting, monitoring and evaluation system and gender auditing
  - Improving country performance on gender equality, women’s empowerment and overall development goals
- All government departments, public entities, provinces and municipalities mandated to deliver on women’s empowerment and gender equality
Why is there a need for GRPB?
  • High-level problem statement
    • Policy context
  • Previous GRPB initiatives in SA
    • Key lessons
High-level problem statement (1)

• Following advances in first phase of democracy in gender policy, planning and budgeting (GRB), more recently SA has experienced a gender mainstreaming “recession”
• Despite policies and prescripts, WEGE an after-thought or relegated to a sector or specific outcome rather than integral component across all sectors, outcomes, spheres of govt
• Poor accountability for WEGE performance across state sector
• Weak institutionalization of gender mainstreaming
• Lack of coherent gender-responsive policy, research, planning, budgeting, monitoring and evaluation and gender auditing policies, programmes and systems
• Many policies gender blind/ silent >> status quo or regression
MTSF mostly gender blind

MTSF indicators which explicitly include gender disaggregation, or have gender relevance
- 65% gender silent
- 28% could be disaggregated but make no reference to gender
- Only 7% explicitly mention gender

% genderable, but not explicitly gender-sensitive in the MTSF
% explicitly mentioning gender in the MTSF
% not gender-relevant

Percentage of MTSF indicators explicitly mentioning gender

<table>
<thead>
<tr>
<th>Outcome</th>
<th>N</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: Education</td>
<td>55</td>
<td></td>
<td></td>
<td></td>
<td>60%</td>
<td></td>
<td></td>
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<tr>
<td>2: Health *1</td>
<td>97</td>
<td>38%</td>
<td></td>
<td></td>
<td>13%</td>
<td></td>
<td></td>
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<tr>
<td>3: Safety *2</td>
<td>100</td>
<td>27%</td>
<td></td>
<td></td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4: Economy *3</td>
<td>61</td>
<td>20%</td>
<td></td>
<td></td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5: Skills</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
<td>63%</td>
<td></td>
<td></td>
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<tr>
<td>6: Infrastructure</td>
<td>109</td>
<td>1%</td>
<td></td>
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<tr>
<td>7: Rural development</td>
<td>43</td>
<td></td>
<td></td>
<td></td>
<td>51%</td>
<td></td>
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<tr>
<td>8: Human settlements *4</td>
<td>60</td>
<td>18%</td>
<td></td>
<td></td>
<td>2%</td>
<td></td>
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<tr>
<td>9: Local government</td>
<td>36</td>
<td>22%</td>
<td></td>
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<tr>
<td>10: Environment</td>
<td>70</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11: International</td>
<td>35</td>
<td>6%</td>
<td></td>
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<tr>
<td>12: Public service</td>
<td>46</td>
<td>24%</td>
<td></td>
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<tr>
<td>13: Social protection *5</td>
<td>67</td>
<td></td>
<td></td>
<td></td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14: Nation building *6</td>
<td>41</td>
<td>32%</td>
<td></td>
<td></td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALL OUTCOMES</td>
<td>872</td>
<td>28%</td>
<td></td>
<td></td>
<td>7%</td>
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</tr>
</tbody>
</table>
High-level problem statement (2)

• E.g lack of gender mainstreaming within Mandate Paper, the budget prioritization framework for 2019
• While various initiatives exist, these are often fragmented and even duplicate each other
• Pockets of knowledge and evidence production on WEGE but no single repository
• Weak sex-disaggregated data curtails understanding of programme performance, outcomes and impact on WEGE
• Limited evidence-based national and sectoral diagnostics on WEGE to inform interventions, policy, programming, budgeting
• DOW extremely limited human and financial resources
• Insufficient high-level buy-in incl. cabinet, Minister of Finance, parliament etc.
Policy commitments

• Gender mainstreaming in general and specifically gender responsive planning, budgeting, M&E arises from multiple international, continental and regional commitments incl.:
  – CEDAW (1979)
  – 4th World Conference on Women, 1995 (Beijing)
  – 23rd Special Session of the UN General Assembly (2000)
  – Monterrey Consensus (2002)
  – Paris Declaration (2005)
  – UN CSW50, CSW52 (2006)
  – MDGs (2000), SDGs (2011)
  – SADC Protocol on Gender and Development (as amended 2016)
Previous GRB initiatives in SA (1)

  – Indepth gender analysis of national dept budget statement
  – Driven by Parliamentary Joint Standing Committee on Finance in collaboration with NGOs
  – Annual Women’s Budget publication
  – Attracted international attention and model for other countries
  – In context of major transformation agenda incl. new Constitution
  – Shift from Finance Committee to Joint Monitoring Committee on the Improvement on the Quality of Life and Status of Women

• Commonwealth secretariat (1998 & 1999)
  – Located in National Treasury
  – International consultants
  – Reference to gender in budget book
Previous GRB initiatives in SA (2)

- **Provincial initiatives**
  - Western Cape (2000 & 2007-2012)
    - Led by Premier’s Office/ Departmental gender statements produced
    - Led by Premier’s Office linked to provincial gender policy
    - Departmental gender budget statements
  - Gauteng (2011-2016)
    - Depts required to demonstrate gender programmes and budgets
  - Free State (2018)
    - Pilot project with consultants

- **Departmental initiatives**
  - Fragmented initiatives by gender units or gender focal points
  - Poor sustainability in absence of central directive by National Treasury
Key SA GRPB lessons (1)

- Previous initiatives lacked sustainability & full buy-in at both political and administrative/technical level
- Individual role-players and champions key but need to embed GRPB across multiple institutions, incl. public administration, parliament, CGE, other state institutions, political parties, civil society
- Need political support at highest level as well as technical capacity across the administration and spheres of govt
- Critical roles
  - Minister in Presidency responsible for Women (overall champion)
  - Minister of Finance and National Treasury to drive GRB
  - DPME to facilitate gender responsiveness of PME systems with DOW
  - Key roles for Parliamentary Finance Committee, Women’s Committee and all Portfolio Committees
• External expertise of value but avoid excessive reliance on consultants and ensure skills transfer
• Build technical capacity across the system
• Accountability mechanisms key (cabinet, parliament, Auditor General etc.)
• Critical to focus on entire public policy cycle – not just budgeting but also policy, planning, budgeting, monitoring and evaluation and gender auditing
• Voluntary systems tend to lack teeth and sustainability
• Consideration should be given to
  – legislative mechanisms to enforce compliance
  – other mechanisms to incentivize compliance
What approach should be adopted now?
Public policy cycle

Need to locate GRPB within overall public policy cycle and public financing systems

- Social problems/needs/gender gap
- Mandates
- Adjustments/refinements
- Monitoring, evaluation, performance & expenditure review
- Implementation, expenditure
- Policies, programming, prioritisation
- Budgeting
Evidence-based policy & programming (DPME)

- Budget allocation
  - Use of appropriate planning tools
  - Design of plans
  - Operational planning and resourcing
  - Budget projections

- Expenditure monitoring
  - Review, refine and continue
  - Implementation evaluations
  - Monitoring systems
  - Performance dialogues

- Value for money
  - Assessing the achievement of results

- Evaluation
  - Assessing value for money

- Planning
  - Options for addressing the problem
  - Use of appropriate planning tools

- Intervention
  - Use of instruments
  - Use of theory of change

Development Agenda
- Recommendations for improvement and decision making

Communicate
- Performance and expenditure reviews
- Impact evaluations
- Administrative data

Reflect
- Forecasting and modelling
- Diagnostic evaluation
- Participatory research synthesis

Learn
- Situational analysis
- Problem analysis
- Performance and expenditure reviews

Document
- Policy analysis
- Value for money

SERVICE DELIVERY

Communicate
- Monitoring systems
- Performance dialogues

Learn
- Performance monitoring
- Implementation evaluations

Document
- Policy analysis
- Value for money

Reflect
- Forecasting and modelling
- Diagnostic evaluation
- Participatory research synthesis

Learn
- Situational analysis
- Problem analysis
- Performance and expenditure reviews
Overall approach

• Achievement of country gender outcomes requires:
  – setting clear gender-responsive policy priorities across government based on diagnostic/ needs assessment
  – Translating policy priorities into programmes
    • With clear programme outcomes
    • With gender-responsive indicators and targets
    • Targeted interventions, mainstreamed interventions
  – Allocation of budgets to achieve gender priorities and expenditure review against gender outcomes
Overall approach

• Women’s empowerment and gender equality
  – not just a social sector issue but
  – cuts across all sectors and desired outcomes esp. economic empowerment, political participation etc.

• Aim to ensure country, government-wide planning and budgeting processes promote stronger institutional accountability to gender equality commitments incl.
  – Need for comprehensive and integrated approach
  – Gender-responsive policy and programmes at national, sectoral and local level
  – Gender-responsive institutions & systems of public administration
  – Gender-responsive financing which is transparent and adequate
Overall approach

• Sustaining gender-responsiveness requires
  – Strengthening of gender machinery incl. MOW/DOW in Presidency as overall engine/nerve centre, provide leadership and drive coordination on GRPBMEA
  – Gender mainstreaming and institutional capacity across state sector
Overall concept and approach

- Improved performance, better outcomes and impacts for women & girls and improved gender equality
- Gender-responsive planning, budgeting, monitoring & evaluation
- Diagnostic/ gender audits/ consultation/ priorities
- Gender planning, TOC/PT, design, indicators, baselines, targets and budgets based on policy priorities & evidence
- Gender data, monitoring of implementation, expenditure and outcomes, gender reporting
- Learning, adaptive management, better programme design / better implementation, corrective action
- Programme/ sector evaluation, VFM, expenditure/ performance reviews, good practice/ what works
Overall strategy & approach

- GRPBM&EA not introduced on blank slate but in context of existing policies and practices, legislation, programming, systems, procedures for govt-wide planning, budgeting, M&E, auditing

- Overarching policy approach and strategy based on integration:
  - Gender mainstreaming/ gender-responsiveness/ gender lens/ gender perspective/ gender sensitive
  - Outcome/results based/ theory-based programming approach
  - Gender results and transformation (quality of results – GRES)

- Need for pragmatism based on contextual analysis, political priorities, available resources and capacity, risk analysis etc.

- Sustainable, effective, system-wide changes in government take minimum five years
• Moving from gender negative/blind to gender responsive and transformative

• Categorical vs transformative thinking
Overall strategy & approach

• Need pragmatic, multi-pronged, short to medium-term strategy:
  – Mainstreaming gender within existing national PME systems
  – Mainstreaming gender within existing budgeting systems, procedures and performance-based budgeting initiatives
  – Country Gender Indicator Framework linked to normative frameworks (from SDGs to programme performance)
  – Accessing multiple evidence and data sources including government, civil society, academia etc.
  – WEGE interventions and programmes and programmes based on diagnostic and desired outcomes for women & girls
  – Piloting in different contexts to test both conceptual and implementation theory
SA Gender Indicator Framework

Key indicators & targets along results chains, based on theory of change

- SA gender impacts
- SA gender outcomes
- Programme outcomes (intermediate)
- Programme outputs
- Programme activities
- Inputs

- SDGs, AU 2063/Gender Strategy, AGDI, SADC Gender & Dev Protocol, NDP etc.
- NDP, 14 outcomes/POA; sector/ dept priorities
SA Gender Indicator Framework

**Key domains for Gender Indicator Framework**

### Development indicators

Indicators of country gender development impact & national outcomes. Taking into account SDG, AU, SADC & NDP gender policy & indicators as well as SA gender policy priorities.

### Programme performance indicators

Outcome & output indicators for gender priority programmes across 14 Outcomes and sectors.

**Key sector indicators incl.**
- Economic empowerment, financial inclusion, employment, ownership, infrastructure
- Social sector, basic services, health, education
- Governance, agency and voice: representation, participation etc.

**Provincial & local govt indicators**
Other indicators specific to provincial and local government.
Gender mainstreaming within existing PBME systems/institutions:

- Policy, planning (MTSF, POA, SP-APPs), Monitoring & Reporting, Budgeting, GR evaluation, FSDM, CBM, MPAT, Phakisa, auditing etc.
- Focus on most impactful interventions incl small changes that achieve big impacts or system-wide changes
- Interventions may appear “piecemeal” but deliberately conceptualised and designed to achieve system-wide transformation and impact going forward
- Focus on micro-macro transformational mechanisms, where individual actions (micro) generate macro-level outcomes
**Overall strategy & approach**

- **Short, medium and long-term strategy**

**Medium to long-term strategy (2019-2024-2030)**

<table>
<thead>
<tr>
<th>More fundamental reconceptualisation, redesign, and implementation and institutionalisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Comprehensive, evidence-based diagnostic, incl. current levels, indepth review, GRES analysis, enablers and obstacles to implementation etc.</td>
</tr>
<tr>
<td>• Detailed exploration of models, design and recommendation on model for SA, institutionalisation, mechanisms, resources;</td>
</tr>
<tr>
<td>• Comprehensive country-wide programme development, capacity development, manuals etc.</td>
</tr>
<tr>
<td>• GRPB linked to performance-based budgeting reforms</td>
</tr>
<tr>
<td>• Legislation/ legislative amendments</td>
</tr>
<tr>
<td>• Elaboration of roles, responsibilities incl. cabinet, parliament, CGE etc.</td>
</tr>
<tr>
<td>• Monitoring and evaluation plan</td>
</tr>
</tbody>
</table>
Implementation plan
## Key phases in GRPBME process

<table>
<thead>
<tr>
<th>Year</th>
<th>Phase</th>
<th>Key activities and outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017/18</td>
<td>1</td>
<td>• Initial consultation&lt;br&gt;• Development of Draft GRB framework</td>
</tr>
<tr>
<td>2018/19</td>
<td>2</td>
<td>• Existing govt-wide PME policies, systems &amp; procedures + budgeting and expenditure review&lt;br&gt;systems engendered&lt;br&gt;• Country Gender Indicator Framework developed&lt;br&gt;• 25-year review on status of women completed&lt;br&gt;• Women’s Dialogues as inputs on policy priorities&lt;br&gt;• Gender policy priorities for 2020/21 &amp; 2019-2024 identified &amp; form part of mandate paper&lt;br&gt;• Gender-responsive Planning, Budgeting, Monitoring &amp; Evaluation, Audit Framework approved&lt;br&gt;• Free State GRB pilot completed&lt;br&gt;• NSG capacity building on GRPBMEA</td>
</tr>
</tbody>
</table>
### Key phases in GRPBME process

<table>
<thead>
<tr>
<th>Year</th>
<th>Phase</th>
<th>Key activities and outputs</th>
</tr>
</thead>
</table>
| 2019/20  | 3     | • GRPBMEA announced by 6th administration  
  • Gender indicators within SP, APPs, MTSF etc.  
  • Quarterly Gender Performance Reports & Review  
  • GRES analysis  
  • SA GEWE 2019-2024 POA developed  
  • SA GEWE policy framework developed  
  • GRPBMEAF model finalized and implemented:  
    • Piloting: selected national Departments, provinces, Metro  
    • Institutionalisation mechanisms: change management, systems development, guidelines, capacity building and training  
  • Formative evaluation  
  • Legislative review |
## Key phases in GRPBME process

<table>
<thead>
<tr>
<th>Year</th>
<th>Phase</th>
<th>Key activities and outputs</th>
</tr>
</thead>
</table>
| 2020/21| 4     | • Govt-wide rollout of GRPBMEA  
          • Institutionalisation mechanisms: change management, systems development, guidelines, capacity building and training  
          • GRPBME implementation / outcome evaluation (early outcomes)  
          • Gendered sectoral policy reviews / development  
          • Quarterly Gender Performance Reports and Review  
          • Legislative revisions |
Key interventions to date

- Improving gender-responsivefulness of PME systems

**ENGENDERING NATIONAL PLANNING SYSTEM**
- Extensive inputs on Integrated Planning Bill
- Extensive inputs on the Framework for Short to Medium-Term Planning incl. gender planning, monitoring and reporting
- Inputs on monitoring of the NDP and the gender content of POA
- Gendered analysis of selected 2018/19 APPs in economic cluster
- Inputs on review of Outcome 14

**ENGENDERING NATIONAL EVALUATION SYSTEM**
- Inputs on gender mainstreaming within NEPF review, NES improvement plan incl. NEP, DEPs & PEPs
- Targetted WEGE evaluations
- WEGE evaluation questions within evaluation

**INSTITUTIONALISATION**
- Establishment of high-level Inter-Departmental Steering Committee on GRPBMEA
Key interventions to date

- Improving gender-responsiveness of PME systems

**ENGENDERING NATIONAL POLICY & PME SYSTEMS**
- Study on gender-responsiveness of national PME systems (with DPME)
- Post-CSW POA policy priorities on gender equality and women’s empowerment
- 25YR to make recommendations on:
  - Overall gender policy priorities for 2019-2024
  - WEGE interventions within sectoral policies

**GENERATION OF GENDER-RESPONSIVE DATA & EVIDENCE**
- Initial conceptualisation of Country Gender Indicator Framework, including gendering SDGs, NDP etc.
- 25YR incl. performance on SDGs, AU Agenda 2063, NDP, MTSF
- SDG Goal 5 Working Group with Stats SA, CGE, DPME etc.
- CGE country report on African Gender Development index (AGDI)
- Draft SDGEA report
## Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: PLANNING &amp; MONITORING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mandate paper</strong></td>
<td>• Mandate paper to include country gender policy priorities, based on evidence, including 25-year review etc. to inform budget allocations</td>
</tr>
<tr>
<td><strong>NDP</strong></td>
<td>• Gendered revision of NDP in line with SDGs, international instruments, gender policy priorities</td>
</tr>
</tbody>
</table>
| **MTSF / NDP monitoring through the outcomes approach and POA** | • Mainstreamed and targeted gender outcomes/outputs etc.  
• Gendered analysis of POA data  
• Every outcome performance report to include analysis of gender performance (DOW-DPME) prior to submission to FOSAD and cabinet clusters |
| **Integrated Planning Bill**                            | • Mainstreaming gender throughout Planning Bill  
• Provision for roles of MOW & DOW |
# Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: PLANNING &amp; MONITORING</th>
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</thead>
<tbody>
<tr>
<td>25 year review on women’s empowerment and gender equality</td>
<td>• DOW coordination of 25-year review on status of women and gender equality since 1994 with a specific focus on 2014-2019</td>
</tr>
<tr>
<td></td>
<td>• Performance 1994-2019</td>
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<td>• Programme performance</td>
</tr>
<tr>
<td></td>
<td>• Overall outcomes and development indicators</td>
</tr>
<tr>
<td></td>
<td>• Diagnostic / Problem statement</td>
</tr>
<tr>
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<td>• Identification of gaps and priorities ahead</td>
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<td>• Inputs/ Women’s Dialogues in various sectors</td>
</tr>
</tbody>
</table>
### Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: PLANNING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Short to medium term planning framework / regulations</strong></td>
<td>• Gender-mainstreaming in all institutional, sectoral, provincial and municipal plans and in implementation programmes, logframes etc.</td>
</tr>
<tr>
<td></td>
<td>• Gender analysis in situational analysis</td>
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<td></td>
<td>• Every public entity 5-year and annual MTEF plans to include per programme:</td>
</tr>
<tr>
<td></td>
<td>• Mainstreamed gender indicators &amp; targets</td>
</tr>
<tr>
<td></td>
<td>• Targeted gender intervention targets</td>
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<tr>
<td></td>
<td>• TIDs to indicate how data collection will be sex-disaggregated</td>
</tr>
<tr>
<td><strong>Medium Term Strategic Plan</strong></td>
<td>2019-2024 MTSP to include gender policy priorities, outcomes, indicators and targets based on analysis of evidence</td>
</tr>
<tr>
<td><strong>Short-term plans/ APPs (annual plans)</strong></td>
<td>Gender analysis of APPs (first and second draft)/ provision of feedback to Depts &amp; entities</td>
</tr>
</tbody>
</table>
### Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: POLICY PRIORITIES</th>
</tr>
</thead>
</table>
| **Five-year gender policy priorities for 2019-2024** | • Five-year Gender Delivery Agreements (President-Ministers)  
• Annual gender priorities  
• Gender priorities integrated as part of Mandate Paper (Budget Prioritisation Framework)  
• Informs budget bids and allocations of Depts & public entities  
• Gender included in Budget Statement by Minister of Finance  
• Gender priorities and targets integrated within Dept Medium and Short-term Plans (Strategic Plans/ Annual Performance Plans) |
Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: EVALUATION, KNOWLEDGE AND EVIDENCE</th>
</tr>
</thead>
</table>
| National Evaluation System (1) | • Gender-responsive NEPF & across evaluation cycle  
• GR NES evaluation improvement plan  
• Gender-responsive guidelines and templates to be developed and GR revision of existing guidelines  
• **Evaluation planning and budgeting**  
• NEP/ PEPs/ DEPs to include:  
  • Equitable resource allocation to gender eval  
  • Targeted gender evaluations  
  • GR evaluation questions in each evaluation  
• Gender responsive analysis of concept notes and NEP proposals  
• **Commissioning and undertaking evaluations**  
• Gender sensitive TORs and gender balance of evaluation teams  
• Gender sensitive TOC, causal theories, TBE and contextual analysis etc. |
## Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach: EVALUATION, KNOWLEDGE AND EVIDENCE</th>
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</thead>
<tbody>
<tr>
<td>National Evaluation System (2)</td>
<td>• Data collection and analysis</td>
</tr>
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<td>• Sex-disaggregation</td>
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<td></td>
<td>• Perspectives of women/ men</td>
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<tr>
<td></td>
<td>• Prevent hidden biases</td>
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<td></td>
<td>• Development of gender-specific indicators</td>
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<tr>
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<td>• <strong>GR findings and recommendations</strong></td>
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<td>• GR recommendations incl. on programme performance, outcomes, sex-disaggregated data etc.</td>
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<td>• <strong>GR Improvement plans</strong></td>
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<td>• <strong>GR capacity building, professionalisation and institutionalization</strong></td>
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<tr>
<td>Knowledge Repository</td>
<td>Collaboration on gender component of DPME</td>
</tr>
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<td>Knowledge and Evidence Repository</td>
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</tbody>
</table>
Mainstreaming gender within PBME

<table>
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<tr>
<th>National component</th>
<th>Gender-responsive approach (FSDM &amp; MPAT)</th>
</tr>
</thead>
</table>
| **Frontline Service Delivery Monitoring and Citizen-Based Monitoring** | • Gendered assessments, interventions and improvement plans  
• Include gender-sensitivity of services/sites etc. within rating system, incl. schools, health institutions, police stations, courts etc.  
• Prioritisation of women-specific service assessments |
| **MPAT** | • Mainstreaming of gender and ratings across all KPAs  
• Gender-responsiveness key in review of MPAT  
• Consultation with DOW in review process |
### Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach (OTHER)</th>
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</thead>
</table>
| **International Reporting** | • Indicators arising from international obligations to be included in overall govt planning, M&E frameworks and data collection systems  
• Collaboration on international reporting |
| **Phakisa** | Phakisa prioritisation to include:  
• Interventions which will impact on improved GEWE  
• Mainstreaming of gender issues within other Phakisa projects |
| **National and Provincial PME Forum** | Key gender planning, monitoring and evaluation issues as standing item on agendas of PME Forums |
| **FOSAD/Presidency** | Revision of cabinet memo template and SEIAs to include gender requirements |
Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>Gender-responsive approach (OTHER)</th>
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</table>
| **Statistics SA**   | • Collaboration on gender-mainstreaming within the country SDG and reporting systems incl. setting of gender indicators, data collection etc.  
                      • Collaboration on development of Gender Indicator Framework  
                      • Improving SDG indicators and data collection across SDGs  
                      • Gender-sensitive questions across surveys  
                      • Targetted surveys |
| **CGE**             | • Oversight, accountability and research |
| **Parliament**      | • Oversight and accountability of depts |
| **Auditing**        | • Internal audit to include WEGE in audit plans  
                      • AG to undertake gender-responsive auditing of Dept plans and performance |
## Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>GENDER RESPONSIVE BUDGETING</th>
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</table>
| **National Treasury**   | • Overall fiscal framework to incorporate WEGE considerations  
                            • Gender responsiveness to be addressed across the budget cycle and MTEF processes  
                            • Budget Guidelines to include requirement/ incentives on gender-responsive allocations and programme bids  
                            • Budget bids to demonstrate allocations for WEGE  
                            • ENE and AENE to include sections on WEGE allocations per vote  
                            • Each vote to include gender indicators per programme (mainstreamed & targeted)  
                            • Allocations to key WEGE interventions to be included in MTBPS and National Budget Speech  
                            • Gender to be included in NT database  
                            • Treasury regulations on gender to be issues  
                            • Guidelines to be issued to Provincial Treasuries |
## Mainstreaming gender within PBME

<table>
<thead>
<tr>
<th>National component</th>
<th>LEGISLATION</th>
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</table>
| Legislation        | • PME Bill to include GR requirements  
                    • Legislative review and reforms on existing and envisaged legislation to incorporate gender perspective  
                    • Gender responsiveness of PFMA, MFMA etc. to be considered |
Key roleplayers

- Key partners on GRPBM&EA
  - Central roles by DOW, DPME/NPC, National Treasury, CGE
  - Other key centre of govt departments: DPSA, Stats SA, COGTA
  - Provinces – led by Offices of the Premier and Provincial Treasuries
  - Municipalities – led by Mayors offices
- Advancing gender equality an obligation of all govt departments and public entities
- Ad hoc approach will be both inefficient and slow
- High-level Interdepartmental Steering Committee on Gender Responsive Policy, Planning, Budgeting, M&E, Research, IR
Consultation

• Consultations to date
  – Civil society stakeholders (May 2018)
  – National Treasury (June 2018)
  – Inter-departmental HLSC (June-September 2018) with DPME, NT, Stats SA, DIRCO, CGE, sector depts
  – Researchers, intellectuals, academics, young women in tertiary institutions and others (August 2018)
  – DPME/ NPC (ongoing)
  – Evaluation officials (September 2018)

• Further consultation planned
  – PME Forum (September 2018)
  – SALGA
  – Parliamentary Portfolio Committee on Women
  – Parliamentary Multi-Party Committee on Women
  – GRPB Conference (November 2018)
Conclusion

- Almost 25 years into our democracy, women’s empowerment and gender equality remains elusive
- Rising tide of discontent among women, esp young women
- Gender-responsive planning, budgeting, monitoring and evaluation and gender auditing provides critical opportunity to drive performance on gender equality and empowerment of women and improvement in lives of women and girls
- Need for broad-based collaboration and support to ensure it becomes a reality
THANK YOU ● SIYABONGA ● RE A LEOBOGA ● DANKIE