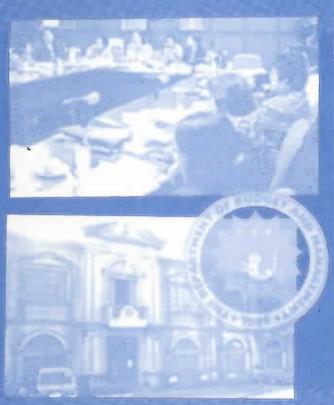
Gender Mainstreaming and Institutionalization in the Budgeting Process





PRIMER

Gender Mainstreaming and Institutionalization in the Budgeting Process

This Primer provides budget people the mechanics on how to evaluate and review the various GAD budget proposals submitted by national government agencies (NGAs), government owned and/or controlled corporations (GOCCs) and local government units (LGUs). The Primer is a result of conscientious efforts of the DBM-NCRFW GAD Working Group. Comments received during the validation sessions with selected NGAs/GOCCs/LGUs, at the central and regional offices have been integrated in this primer.

A Joint Project of the
Department of Budget and Management
and the
National Commission on the Role of Filipino Women
through the support of the
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MESSAGE

The development of this Primer is rooted in the desire of the Department of Budget and Management (DBM) to support the pursuit of gender equality through efficient utilization of government resources. It is a document that concretizes the concept of gender and development (GAD) beyond mere rhetoric and places it within the context of financing the GAD efforts of agencies, local government units (LGUs) and government-owned and/or controlled corporations (GOCCs).

This Primer aims to help the reader understand the concepts of GAD, gender mainstreaming and gender institutionalization. It provides the DBM personnel – its primary users – with a necessary tool that will strengthen their capability to evaluate agencies', LGUs' and GOCCs' GAD Budget proposals. Other agencies would also benefit from this primer as it explains the interlinkage among oversight agencies in ensuring the implementation of gender mainstreaming and institutionalization at all levels of government.

It is our hope that with this publication, one can appreciate how government's budget can be an instrument in attaining gender equality. It is our wish that agencies, LGUs and GOCCs will benefit from our modest contribution and be able to breathe life into the ideals of a gender-responsive development that transforms the lives of both women and men.

/VI amuli EMILIA T. BONCODIN

Secretary Department of Budget and Management

MESSAGE

The implementation of the GAD Budget policy is one of the critical strategies the Philippine government has adopted to promote women's empowerment and gender equality. Because the policy ensures that a stable source of funds for the implementation for the PPGD as well as other laws and international commitments on women is available, it mirrors the government's political will to advance the cause of women.

Six years after, the policy has gained international recognition having been claimed as a best practice in gender mainstreaming. This is because to a large extent, it has demonstrated that negotiation for resources for women is not remote. The sexual harassment desks, the day care centers, the crisis centers and counseling services, the police women's desks- all funded from the GAD budget- are but few of the many examples why the GAD policy is an interesting learning experience.

The challenge therefore is to further strengthen the implementation of the policy. Hence, the DBM in partnership with the NCRFW has developed this Primer. This is our response in addressing the clamor to intensify the provision of technical assistance on GAD budgeting. The deeper understanding of the GAD budget will enable DBM technical personnel to take an active role in facilitating mainstreaming gender perspective in the budgeting work of the government

DBM's commitment in integrating gender in the budgeting operations, processes and guidelines is indeed inspiring. We commend DBM under the leadership of Secretary Emilia T. Boncodin and Undersecretary Cynthia G. Castel for the development of this Primer. We assure the GAD advocates in government that NCRFW and DBM will sustain the gender-responsive budgeting that we have started. Engendering the budgeting process is the mission we have committed to fulfill. And this Primer is one instrument to make this happen.

AURORA JAVATE-DE DIOS

June Jusis

Chairperson

National Commission on the Role of Filipino Women

Gender and Development (GAD)

What is Gender and Development (GAD)?

Gender and Development, or GAD, is an approach to or a paradigm of development that focuses on how social, economic, political and cultural forces determine how differently women and men participate in, benefit from, and control resources and activities for development. It is a

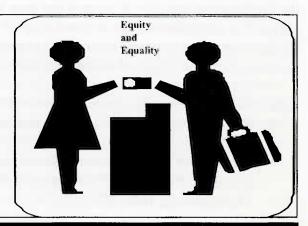


framework of analysis that seeks to understand the role of gender in the attainment of development goals. It recognizes the different roles, responsibilities, expectations, interest, needs, and contributions of women and men in society and integrates these gender concerns in the development planning process. For government, adopting GAD means considering gender as a factor when it plans, budgets for, implements, monitors and evaluates programs, activities, projects and services for development.

GAD recognizes women as agents of development and not merely as passive recipients of development assistance. It questions the underlying assumptions of current social, economic and political structures, examines them, and demands commitments to change all forms of structures and relationships that promote inequality, including unequal power relations between women and men.

Studies show that there is a strong connection between gender equality and development. The World Bank Policy Research Report (May 2001), for example, showed that where the status of women is better, there is less poverty, population growth is slower, the education and health of the population are better, and corruption in government is less, among others.

The OBJECTIVE is to make GAD NOT just a project, but an part of the way the agency does its work to achieve its GOALS of GENDER EQUITY and EQUALITY.



Data from the National Statistics Office (NSO) show that increased women's participation in society from 1988 to 1997 resulted in a rise in their share in the labor force by almost 3.3 per cent, an improved literacy rate from 76 per cent in 1989 to 85.9 per cent in 1994, and lowered population growth by three per cent. These figures supported the marked reduction in the incidence of the poor families' index from 40.2 per cent in 1988 to 31.8 per cent in 1997.

How did GAD evolve?

The need to address and integrate women's concerns in development was first intoduced during the '70s, using the Women in Development (WID) framework. The WID focuses on providing services that promote equal participation of women in education, employment and other spheres of society. Soon after, another approach or paradigm, Women and Development (WAD) emerged. WAD focuses on the relationship between women and development processes rather than purely on strategies that integrate women in development. These two approaches, however, could not fully explain why women continued to be disadvantaged in society so that a third approach, GAD, evolved in the late '80s as an enhancement to the WID and WAD concepts. GAD recognizes women as agents of development, not merely as passive recipients of development assistance.

A comparative matrix on the WID, WAD and GAD approaches is found in Appendix

What is a GAD Policy?

A GAD policy is the concrete translation of government's commitment to the Constitutional provision on gender equality. The 1987 Philippine Constitution affirms the fundamental equality of women and men before the law (Art. II, Sec. 14). To pursue this commitment, government adopted GAD as one of its policies to define the direction of development that it wants to undertake, refocus its strategies, priorities and resource allocation, and enhance its plans and programs.

National laws, plans and policies have been issued to strengthen the implementation of the GAD policy, some of which are cited below:

- Women in Development and Nation Building Act (Republic Act 7192);
- Executive Order No. 273, adopting the Philippine Plan for Gender-Responsive Development, 1995-2025;

- Medium-Term Philippine Development Plan, 1993-2004;
- GAD Budget Provision in the General Appropriations Act, 1995-2001; and
- Joint Memorandum Circular No. 99-4 and 2001-01 on GAD Planning and Budgeting issued by the Department of Budget and Management, the National Economic and Development Authority, and the National Commission on the Role of Filipino Women.

Government is committed to implement the GAD policy through its gender mainstreaming and institutionalization program.

Gender Mainstreaming and Institutionalization

What is gender mainstreaming?

Gender mainstreaming is the strategy to pursue government's GAD policy. It affirms gender equality as a fundamental goal of broad policy decisions, institutional structures and resource allocation. It advocates for the inclusion of women's views and priorities in decisions concerning development goals and processes (Schalkwyk, Thomas, Woroniuk, 1996).

At the agency level, *mainstreaming* means revisiting or reviewing existing mandate, development directions, policies, projects and services to address gender equality issues. It may entail a refocusing of the agency's mandate, redirection of its development priorities, redefinition of policies, and enhancement of programs, activities and projects (PAPs). A collective shift in agency perspective and strategic changes in the organization and its people will allow transformation to happen. The shift may also necessitate changes in the agency's budgetary or resource allocation. The gender perspective is integrated in the entire development process through gender analysis.

Gender analysis is an essential tool to understand how an organization promotes gender equality. It identifies the potential differential impact of policies, programs, activities and projects on the status, roles and responsibilities of women and men in society, as well as on their access to and control of resources, benefits and opportunities. In the context of government agencies, it provides information on possible entry points as well as constraints in reducing gender inequalities and promoting more equal gender relations between women and men.

This integration will transform the existing PAPs to gender-responsive PAPs that address gender equality and equity. Figure 1 shows the process of integrating the gender perspective in the development process.

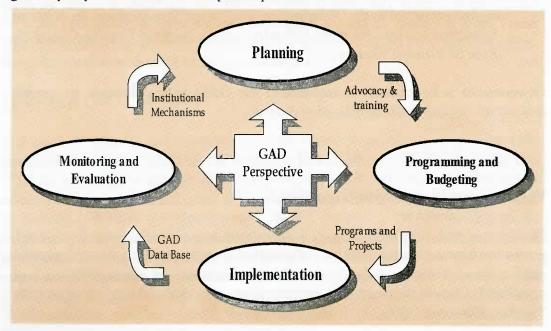


Figure 1 Integration of gender perspective in the development process

How is gender mainstreaming done?

Experiences of agencies show that gender mainstreaming is initiated through the following entry points: (a) Policies; (b) People; (c) Enabling Mechanisms; and (d) Programs and Projects.

Policies are most potent in determining if a shift in development perspective is in fact happening and the agency is seriously undertaking steps to attain gender equality within its organization and for its clients. For instance, RA 7192, or the Women in Development and Nation Building Act which mandates agencies to allocate resources for gender mainstreaming, has enabled government to track which agencies utilized resources to fund PAPs that promote gender equality. For mainstreaming to work, it is also necessary that people within the agency appreciate and accept their role in transforming their organization. As shown by present implementation of the GAD policy, agencies with top-level champions have greater chances of making necessary changes in the status quo.

Enabling mechanisms include, but are not limited to, the agency's structures and systems, its information system and availability of gender-responsive database, and resource allocation. The DBM's effort to facilitate agencies' understanding of the GAD Budget through sustained issuance of guidelines and the provision of technical assistance is a major contribution in strengthening these mechanisms of government. The creation of GAD Focal Points and a GAD trainors' pool is also vital in advocating for and gaining more support for GAD in the organization.

The most challenging transformation that should happen in gender mainstreaming involves the regular **PAPs** of agencies. The NCRFW ensures that gender issues are addressed in the agency PAPs. National policies that support this undertaking are already in place. Many agencies even draw up their own policies to integrate gender equality goals and institute change.

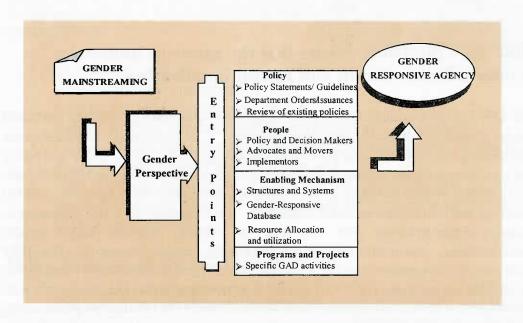


Figure 2 Integration of GAD perspective through the entry points, illustrating their importance in transforming an agency into a gender-responsive one.

How is gender institutionalization attained?

Gender mainstreaming is a systematic approach that transforms an agency into a gender-responsive one. The steps leading to gender mainstreaming are (a) **foundation formation**, where people in the organization understand, appreciate and imbibe the need for change; (b) **installation of enabling mechanisms**, includes the conduct of advocacy and capability-building programs and establishment of mechanisms such as GAD database; (c) **application** of the GAD policy by mobilizing the organization to implement gender mainstreaming; and (d) **institutionalization** and empowerment.

To sustain gender mainstreaming, agencies have to continually integrate gender issues and concerns in their existing PAPs. There must be a regular evaluation and assessment of the mainstreaming efforts done at the agency level. The gender perspective must be constantly embedded in the planning, programming, budgeting and monitoring of agency operations to attain **gender institutionalization**.

DBM Roles and Responsibilities

How does the DBM ensure that the agencies undertake gender mainstreaming and institutionalization?

The DBM plays a critical role in guiding agencies undertake proper and sustained gender mainstreaming and institutionalization. It is particularly responsible for formulating and disseminating guidelines that operationalize the GAD Budget policy and providing relevant technical assistance through the following: (a) budget forum; (b) technical budget hearing; (c) one-on-one consultation with agencies; and (d) meetings and workshops on GAD budgeting. It is important for DBM personnel to understand the strategic role they play in helping agencies attain gender mainstreaming and institutionalization in a fiscally responsible manner. The DBM must ensure that agencies, state universities and colleges, government-owned and/or controlled corporations (GOCCs) and local government units (LGUs) comply with the budget call provision requiring them to submit their GAD Budget proposals along with their overall budget proposals.

Other oversight agencies such as the NCRFW, NEDA, the Department of the Interior and Local Government (DILG), and the Civil Service Commission (CSC) have distinct but complementary roles to ensure that mainstreaming is happening at all levels of government. Appendix B presents a comparative matrix of functions and responsibilities of these oversight agencies.

At the agency level, a GAD Focal Point system is established to serve as a catalyst and to facilitate its mainstreaming efforts. For one, this system reviews the agency's regular PAPs and determines how best to address the gender issues and concerns within the agency and among its clients.

The Roles of the CAD Focal Foint

What is a GAD Focal Point?

In 1989, then President Corazon Aquino issued Executive Order No. 348 mandating the creation of a GAD Focal Point in all government offices.

The mechanism aims to mobilize efforts on gender-responsive planning and programming at the agency level and is tasked with the following responsibilities:



- Catalyze or provide direction and coordinate programs and projects related to women and GAD concerns;
- Oversee the implementation of the GAD policy in the agency. This means looking after the daily management and operation of GAD PAPs;
- Consolidate and make information on ongoing efforts in gender mainstreaming available to clients and the organization; and
- Lead in the accomplishment of policy and plan requirements as required by law and oversight agencies. This includes the preparation of the agency's GAD Plan and Budget.

Other Features of the GAD Focal Point:

The size, form, membership/composition, structure, mandate, and the term of office of the GAD Focal Point members may vary depending on the needs of the agency or the locality it serves. Usually, the structure adopted may be in the form of a technical working group, a secretariat, a constituted special group or a duly designated person. The GAD Focal Point is oftentimes headed by one who has enough clout in the agency and the members are relatively influential in their respective areas. The cost to operationalize the GAD Focal Point shall be taken from the regular agency budgets attributed to existing PAPs.

The GAD Focal Point is created through a written directive from the highest official of the agency. It should be headed by a top-level official not lower than an Undersecretary or its equivalent rank in the case of Central Offices and not lower than the rank of an Assistant Director or its equivalent position at the sub-national levels. They are expected to orchestrate the efforts of the different units of the agency in the preparation, implementation and monitoring of GAD Plans and Budget.

DBM Office Order No. 213-99 dated 13 July 1999 created the department's GAD Focal Point Systems. Separate Chairpersons were designated at the central and regional offices, i.e., the Undersecretary for Management and the different Regional Directors assisted by a technical working Group and a secretariat, respectively.



Among the responsibilities of the GAD Focal Points, aside from its regular reportorial functions is the formulation of sustainable GAD capability-building and advocacy programs to promote appreciation and participation of DBM officials and staff in gender and development efforts.

GAD Plan

What is a GAD Plan?

A GAD Plan is a tool for gender mainstreaming. It is a systematically designed set of programs, activities and projects carried out by agencies for a given period of time to address gender issues and concerns of their respective sectors and constituents.

Different types of GAD Plans have been formulated and are being implemented to date, such as the PPGD, 1995-2025. For this primer, however, a GAD Plan refers to a three-year rolling plan of national government agencies (NGAs), state universities and colleges (SUCs), LGUs and GOCCs. This three-year rolling plan is crafted to be the basis of the three-year budget required by the public expenditures management initiative reforms. These plans are translated annually to reflect their GAD activities and the budget required for the year (See Appendix C for a sample GAD Plan).

A GAD Plan is an integral part of the overall agency plan. It consolidates the different GAD-related activities within the existing regular PAPs of the agency. Thus, it should be formulated as part of the agency's planning process.

Why is there a need for a GAD Plan?

A GAD Plan spells out the specific commitments of an agency, local government unit, state universities and colleges, or government corporation in implementing GAD and provides the framework for responding to gender issues that affect the organization and its clients. It also encourages stronger accountability among them in their pursuit of gender equality goals.

How is a GAD Plan formulated?

Planning for GAD follows the regular planning processes of the NGAs, SUCs, LGUs and GOCCs. This is because GAD and its attendant activities work within the existing mandate and context of the organization, find their relevance in the nature and design of regular PAPs, and make use of resources allocated for these PAPs.

GAD planning is basically incorporating the gender perspective in the organization's annual planning exercise. To do this, gender analysis is necessary to assess the organization's mandate, planned thrusts and PAPs. It also provides more realistic and meaningful insights on how GAD can be integrated in the regular planning process and the agency plan.

Ideally, NGAs, SUCs, LGUs and GOCCs need to conduct beforehand an assessment of their mandate and policy directions to define how GAD objectives figure in their thrusts. A careful study of each PAP follows to determine its potential to respond to various gender issues of the organization and its clientele. Responses to gender issues may also mean identifying new activities within existing PAPs to enhance or modify current activities or work processes that promote gender equality and discontinue those that do not.

The role of the GAD Focal Point becomes especially important in the continuing assessment of the organization's mandate and plans so that representation to the system is encouraged from all units, departments and offices.

In the case of LGUs, gender analysis puts special attention to the peculiar situation of each locality. Local leaders and planners must take note of the prevailing or dominant issues of their women constituents and assess the effectiveness of their responses to them. Local governments are encouraged and are free to implement new PAPs and services to address emerging gender issues.

What are the procedures for the submission and approval of an agency's GAD Plan?

Planning for GAD officially starts when NGAs and GOCCs begin with their regular planning exercises. Ideally, this happens within the third to fourth quarter of each year. At this stage, technical assistance on gender analysis and planning can be requested from the NCRFW. The three-year rolling plan shall be forwarded to the NCRFW for review and approval on or before October 30 of each year.

If found valid and in order, the proposed GAD Plan is endorsed by NCRFW to the DBM for the latter's reference in reviewing the annual GAD Budget. At this point, the GAD Plan is considered approved. Otherwise, the NCRFW will send the document back to the agency for possible revisions or it may opt to provide more technical assistance to enhance the Plan. Figure 3 illustrates the procedures and timetable for the submission and approval of the GAD Plan and Budget.

GOCCs with no government support are enjoined to submit their GAD Plans to the NCRFW. However, they may have to include in their Corporate Operating Budgets (COBs) a copy of their GAD Plans as approved by their respective Board of Directors.

The formulation of the GAD Plans for LGUs shall follow the local planning and budgeting cycle. The procedures on plan formulation, submission and approval are covered by Joint Memorandum Circular No. 2001-01issued by the DILG, NCRFW and DBM.

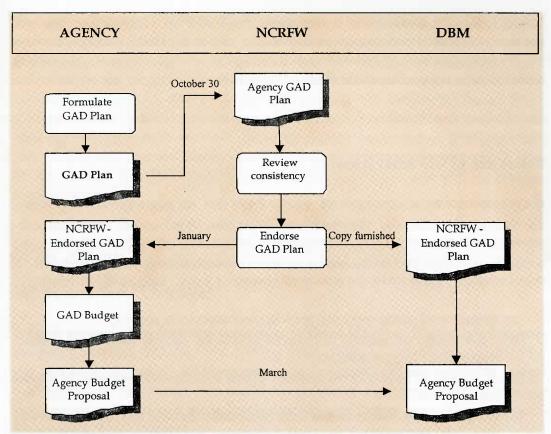


Figure 3. Procedures and Timetable for the Submission and Approval of the GAD Plan and Budget

Can there be a GAD Budget without a GAD Plan?

The DBM upholds the fundamental policy that "a GAD budget shall operationalize a GAD Plan". Hence, all agencies are enjoined to submit their GAD budget proposal supported by a corresponding GAD Plan. The financial requirements of the GAD Plan are included in the agency's and GOCC's GAD Budget proposal. Thus, the NCRFW-endorsed GAD Plan serves as basis for the review and evaluation of the agency's and GOCC's GAD Budget. It helps the DBM decide if the budget proposals are consistent with and sufficient to the activities these offices have committed to implement for the year.

Self-sustaining GOCCs are encouraged to seek the endorsement of the NCRFW for their GAD Plans. They shall submit their corporate GAD Plan together with their COBs to the DBM, beginning of the year. This shall be the basis of the DBM's review of proposed corporate GAD budgets.

For the LGUs, the cost required to implement the GAD Plan is included in their total appropriated annual and supplemental budgets. Since the DBM routinely reviews the annual budget of highly-urbanized city and provincial governments, it needs to be furnished a copy of the GAD Plans of these LGUs.

GAD Activities

What are GAD activities?

GAD activities are components of regular PAPs that are made gender-responsive. Through gender analysis, the objectives, strategies, targets, work processes, subactivities and resources of all existing PAPs are assessed as to their relevance and potential to address prevailing gender issues of the organization and the clientele. If found strategic, these PAPs are enhanced in various ways, such as the following:

- (a) inclusion of gender equality goals in their overall objectives;
- (b) redefinition of existing policies to reflect the shift to their more gender-responsive implementation;
- (c) expansion of targets to encompass outputs meant to address specific gender issues;
- (d) integration of sub-activities or work processes to expand and improve delivery of goods and services to women clientele and women personnel of the organization;
- (e) modification of existing sub-activities or work processes that tend to aggravate gender-based inequalities; and
- (f) inclusion of indicators to measure the performance of gender-related targets and outputs.

The enhancement or modification of regular PAPs is two-tracked:

- (a) **Organization-focused**, where efforts are geared to respond to gender issues that affect the welfare and performance of women and men employees; and
- (b) Client-focused, where efforts address gender issues that affect their clients. This includes upgrading of skills and knowledge of employees on GAD to improve their service delivery to clients.

In identifying GAD activities, special attention should be focused on the 12 areas of concern previously identified by the NCRFW, the same areas of concern specified by the Beijing Platform for Action, the women's agenda laid out during the Fourth

World Conference on Women. These are poverty, education and training, health, violence against women, armed conflict, economy, power and decision making, institutional mechanisms for the advancement of women, human rights, media, environment, and the girl child. The activities to be identified must be specific to the mandate of the agency, such as the DENR's projects on community-based forest management or coastal environment, where measures responding to gender issues affecting the beneficiaries are made part of the projects. In doing this, it is imperative that specific and relevant gender issues be articulated before any enhancement can be done in regular PAPs. Otherwise, focus is lost and the outcome will not make as much difference.

GAD Budget

What is a GAD Budget?

A GAD Budget is the financial translation of the GAD Plan. It reflects a four-year budgetary cost that includes the following information: (a) actual costs incurred for the year just concluded; (b) the current year's budget; (c) the requested budget requirements for the coming year; and (d) the projected amount required to implement GAD activities for the year immediately following the budget year (See Appendix D for a sample GAD Budget).

Since the GAD Plan is inherent to the overall agency plan, its cost requirement or the GAD Budget necessarily comes from the agency's approved budget as contained in the GAA. For LGUs, this would mean that the GAD budget is sourced from their annual and supplemental budgets. The GOCCs, on the other hand, have to tap their approved COBs to fund their respective GAD Plans. The GAD budget must not be interpreted as an additional and separate fund that will be provided by the national government.

How is a GAD Budget prepared?

As a policy, the GAD Budget is drawn up based on the estimated cost of GAD activities contained in the GAD Plan. The GAD Focal Point chairperson is responsible for the preparation of the GAD Budget. It must be prepared in close coordination with the agency's Budget Officer to determine the budgetary ceiling available for GAD activities, if any.

The identification of GAD PAPs facilitates the DBM's review of the agency's GAD Budget. With the GAD Plan showing the link between the mandate and the GAD objective, and the relationship between regular PAPs and sub-activities, the DBM can easily establish the CONSISTENCY and RELEVANCE of the proposed resource allocation for GAD undertakings.

The cost of the GAD activities must be within the baseline ceiling of the agency. GOCCs and LGUs must accord a high priority rank for their respective GAD activities and budgets to ensure funding approval and availability.

The review of the agency's GAD Budget proposal is done following the regular evaluation process applicable to the regular agency budget proposal, of which the GAD Budget is a component. Each activity is subjected to the usual high-low analyses framework. PAPs with low priority rankings are to be considered only if these are proposed for funding within the baseline ceilings of the agency.

The DBM shall ensure that all agencies and GOCCs include the GAD Plans and Budgets in their budget proposals. Since the GAD Budget is an integral part of the overall agency budget, approval of the agency budget implies approval of its GAD Budget. Figure 4 illustrates the procedures for the preparation of a GAD Budget.

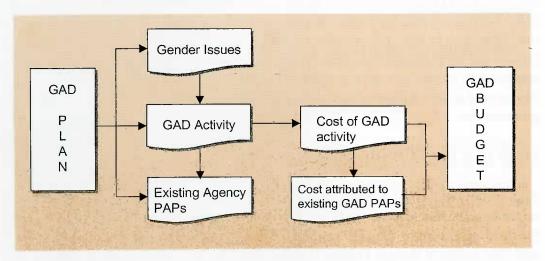


Figure 4 Procedures in preparing the GAD Budget

What are the guidelines applicable to GAD budgeting?

Rules and procedures on GAD budgeting are contained in the following circulars and guidelines issued by the DBM, NCRFW, NEDA and DILG:

- Annual National Budget Calls
- Annual Corporate Budget Calls
- Local Budget Memoranda Issued by the DBM
- Joint Memorandum Circular issued by DBM, NCRFW and NEDA for national agencies
- Joint Memorandum Circular issued by DBM, DILG and NCRFW for LGUs

Local governments and GOCCs are specifically encouraged to secure supplementary funding from private sources where additional resources are deemed necessary to implement new and pioneering GAD activities.

GAD Plan Implementation

How is the GAD Plan implemented?

Once the agency budget is approved by Congress, the corresponding GAD Budget is likewise approved. At the beginning of the year, the agency can already start implementing and operationalizing its GAD Plan. The GAD Focal Point draws the action plan and program of work, outlining the activities to be undertaken. It is also important that the agency, GOCC, and LGU possess the political will and positive attitude necessary to implement their GAD Plan.



The active involvement of all concerned must be encouraged, especially at the local level, such as the participation of women constituents. The DBM, for its part, can ensure the agencies' compliance by requiring them to submit annual agency GAD accomplishment reports, indicating both the physical and financial GAD undertakings.

What are the mechanisms for monitoring the implementation of the GAD Plan and the utilization of the GAD Budget?

Agencies, GOCCs and LGUs are mandated to submit their yearly **accomplishment report** on GAD to gauge if they achieved their objectives and the gender issues are effectively addressed. The report also shows the actual funds used for GAD activities and compares the actual fund utilization against the approved GAD Budget.

The following information are contained in the accomplishment report (See Appendix E for a sample form):

- Gender-related issues and concerns identified in the GAD Plan;
- Regular PAPs where GAD sub-activities and work processes are integrated;
- Specific GAD sub-activities and work processes;
- Amount appropriated, released and obligated for GAD sub-activities and work processes;
- GAD performance indicators; and
- Accomplishments of both financial and physical requirements of GAD subactivities and work processes.

Agencies and GOCCs submit their accomplishment reports to the NCRFW on or before March 31 of each year. The NCRFW evaluates the extent of implementation of each agency and GOCC and consolidates all reports for submission to Congress, copy furnished the DBM. The DBM, on the other hand, uses the consolidated report to review and evaluate the budget proposals of agencies and GOCCs for the succeeding years.

Local governments follow a different procedure in submitting their yearly accomplishment report on GAD. The procedure is covered by a Joint Circular where the DILG is responsible for receiving reports and processing information.

GAD indicators need to be developed to gauge the extent of the agency's GAD implementation. A GAD indicator must provide the quantitative, both physical and financial, as well as the qualitative measures to capture gender-related changes in society over time. It is important that agencies develop good statistical data to come up with a credible indicator.

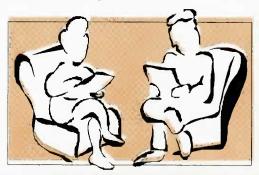
The DBM should focus not only on the physical aspect of accomplishment but also on the absorptive capacity and fund utilization efficiency of the agency. The agency's actual performance will determine the level of budgetary allocation to be recommended for the coming budget year.

Role of the DBM

What is the role of the DBM in gender mainstreaming and institutionalization?

The DBM provides the necessary budgetary guidelines and policies to assist agencies, GOCCs, and LGUs in preparing their GAD Budget proposals. Consistent with the provisions of the budget call, the DBM shall ensure that budget proposals submitted by agencies include a separate GAD Plan and Budget. The GAD budget should indicate the total amount allocated for or attributed to GAD efforts. Using the GAD Budget form, the DBM technical staff must verify if the proposed GAD PAPs included in the agency's GAD Budget are the same ones spelled out in the GAD Plan previously approved by the NCRFW. As part of its efforts to support gender mainstreaming and institutionalization, the DBM provides technical assistance on GAD budgeting not only during the budget forum and the technical budget hearings but during the whole budget process.

The approval of the agency budget which includes the GAD budget, signals the implementation of the planned activities included in the GAD Plan. For purposes of monitoring, agencies are required to submit the duly accomplished annual Accomplishment Report for GAD (Appendix E) indicating the level of expenditures utilized for gender-related activities and the actual physical accomplishments. The report will show the amount of funds allocated by the agency for GAD activities within a particular PPA and the status of fund utilization. It further shows the actual accomplishment in relation to the targets.



Appendices A-F

Appendix A - WID, WAD and GAD: Basic Points of Comparison

Appendix B - Roles and Responsibilities of Oversight Agencies

Appendix C - GAD Plan Sample Form

Appendix D - GAD Budget Sample Form

Appendix E - GAD Accomplishment Report Sample Form

Appendix F - Glossary

References

WID, WAD and GAD: Basic Points of Comparison

Particulars	Women in Develonment (WID)	Women and Develonment (WAD)	Gender and Develonment (GAD)
S in the state of		comon and perceptual (1972)	
Year	1970s	mid '80s	late '80s
Goal/Target	Meet the practical needs of women such as improved income, better health, literacy	Women have always been part of development although they have remained unrecognized	Integrate women's concerns to systems, laws, policies, traditions, institutional practices, rights, and resources
Interventions/ Approaches	Approaches: Equity, anti-poverty, efficiency and empowerment		Interventions include consciousness raising, organizing, women, and women's empowerment.
Focus	 Women's integration to ongoing initiatives Equal participation in education, employment, and other spheres of society 	Relationship between Women and development processes rather than purely on strategies that integrate women in development Productive and income-generating projects at the expense of women's reproductive work	Social construction of gender and the assignment of: - roles - expectations - responsibilities
Critiques	 Women in isolation Women as a homogenous group Selective, short-term 	 North-South relations Includes a critique of donor agencies' agenda for promoting women's integration in development Has little analytical attention to the social relations of gender within classes 	1) Women in relation with men 2) Women's and men's economic and social status and conditions 3) Massive, enduring
Assumptions	Gender relations will change as women become economic partners in development	Women's position will improve when institutional structures become equitable	Women are recognized as agents of development, not merely as passive recipients of development assistance

ROLES AND RESPONSIBILITIES OF OVERSIGHT AGENCIES

HUMAN RESOURCE DEVELOPMENT/ MANAGEMENT							
MONITORING	Provides guidelines for the monitoring and evaluation of projects to determine the extent to which gender concerns have been addressed and mainstreamed	Ensures that agencies submit their annual accomplishment report on GAD			Monitors the submission of LGU GAD Plans	Consolidates status of implementation of LGU GAD	Plans and Budget as well as their implementation concerns
PROGRAMMING AND BUDGETING	Integrates gender in investment programming through development of criteria for project evaluation and review of guidelines in proposal preparation, among others.	Formulates and disseminates the guidelines for the preparation of agency/ GOCC/ LGU GAD Plan and budget	Ensures the integration of gender in budgeting guidelines Provides technical assistance to	agencies/ LGUs on GAD budgeting			
PLANNING	Ensures the integration of gender concerns in the MTPDP Co-formulates guidelines for the preparation of the GAD plans of agencies				Formulates, updates and disseminates guidelines for	the three-year roung UALD plan of LGUs	Provides technical assistance to LGUs in the preparation of their annual GAD Plans
AGENCY/ FUNCTION	NEDA	DBM			DILG		

Appendix B

ROLES AND RESPONSIBILITIES OF OVERSIGHT AGENCIES

	HUMAN RESOURCE DEVELOPMENT/ MANAGEMENT		Provides leadership and direction in making the HRD/HRM in government gender responsive Develops models of gender-responsive HRM systems in government Provides technical assistance to agencies and accredited training institutions in developing and implementing gender-responsive HRD programs Sets standards and policies for agencies and training institutions to develop gender-responsive training sender-responsive training programs and public offerings
	MONITORING	Monitors the implementation of enabling policies on women including legislative, executive and other administrative issuances	
NOTES AND AREA CHEMINES OF CHEMICALES	PROGRAMMING AND BUDGETING		
TOW	PLANNING	Coordinates the preparation, assessment and updating of the PPGD Formulates guidelines for the 3-year rolling GAD plan of agencies Provides pro-active technical assistance to agencies in formulating their 3-year GAD Plan Reviews GAD Plans of agencies	
	AGENCY/ FUNCTION	NCRFW	SSO

GENDER AND DEVELOPMENT (GAD) PLAN

FY 2002

	TARGETS	250	39 24
	GAD PERFORMANCE INDICATOR	Number, tenurial status and location of beneficiaries by sex	Number of gender-sensitive information materials Number of women participating in LTI activities Adoption of gender sensitive provisions in the protocol or guidelines re land negotiation, settlement of agrarian conflicts, etc.
	PROGRAM/ACTIVITY PROJECT (PAP)	Land Distribution and Acquisition	Agrarian Legal Assistance
	IDENTIFIED GAD ACTIVITY	Review, improve and develop CARP policies/ guidelines on land acquisition, e.g. holders of CLOA, Emancipation Patents, Leasehold Contracts and as beneficiary of stock distribution option and production-profit sharing schemes and in the settlement of agar ian reform cases	Information dissemination of the right of women beneficiaries Provide opportunities for women to participate in various LTI activities, e.g. formulation of CARP-LTI operational plans, identification of qualified, identification of qualified beneficiaries, negotiations with land owners, settlement of agrarian conflicts
nt of Agrarian Reform Office of the Secretary	GAD OBJECTIVES	Equitable distribution of titles for the remaining lands to be distributed in the ARCs	Increased awar eness among women beneficiaries of their rights and roles
Department: Department of Agrarian Reform Agency/GOCC/LGU: Office of the Secretary	GENDER-RELATED ISSUE/CONCERN	Only 18% oftotal beneficiaries issued with individual CLOAs are women	Low level of awareness of women of their rights and roles as CARP beneficiaries

GENDER AND DEVELOPMENT (GAD) PLAN

Appendix C

2002

 $\mathbf{F}\mathbf{Y}$

Page 2 of 2

	TARGETS	2 2 5	21 10 250	
Sample (GAD PERFORMANCE INDICATOR	Indicators for gender- responsive economic and infrastructure support facilities develop, adapted and used No. of infra projects implemented and locally managed No. of cooperative members by sex, by level of participation	Number of training modules and IEC materials developed up date and disseminated Number of training activities conducted Number of training by participants by sex, by region	DATE: 30 January 2001 DAY/MO/YR
	PROGRAM/ACTIVITY PROJECT(PAP)	Economic and Physical Infrastructure Support Services (ECOPISS) Infrastructure Income-generating and livelihood projects	Human Resource Development Training and education a) gender-related training b) supervisory c) Technical	nn VAGENCY
	IDENTIFIED GAD ACTIVITY	Provide economic and physical infrastructure support facilities which ensures women's full participation in and enjoyment of benefits, such as: Organizing of cooperatives that allows women to be economically active and that which recognizes women leadership roles and promote their participation in decision-making	Develop and up date training modules and IEC materials to include GAD and/ or new concerns on GAD. Conduct orientation on the installation of the GRM & E system in the CARP MIS. Produce documentary film or slides to showcase the involvement of women agents/ beneficiaries.	APPROVED BY: Secretary VXX HEAD OF OFFICE/AGENCY
Department: Department of Agrarian Reform Agency/GOCC/LGU: Office of the Secretary	GAD OBJECTIVES	Economic and physical infrastructure support facilities in ARC's respond to women/ gender needs	Enhanced knowledge, skills and attitudes on GAD of AR implementors	ış Yaz Ocal Point
Department: Department of Agrari Agency/GOCC/LGU: Office of the	GENDER-RELATED ISSUE/CONCERN	Women have limited access to and control of CARP resources and benefits	Limited capacities and gender-orientation of managers and field implementors in integrating WID/GAD concerns in ARC development	SUBMITTED BY Undersecty. wz Chairperson. GAD FOCAL POIN

Gender and Development Plan

This form presents a summary of the agency/GOCC/LGU GAD Plan for the budget year.

- Gender-related Issue/Concern indicate the gender issues identified by the agency/LGU/GOCC. This may be based on the suggested listing of gender issues identified by the NCRFW to be addressed during the budget year.
- GAD Objectives identify the agency specific thrust and priorities addressing a specific gender issue.
- Identified GAD Activity provide a statement of a work process, which contributes to the implementation of a GAD program, sub-program or project. This refers to specific task to be undertaken to implement the GAD Plan.
- Program/Activity/Project (PAP) identify the mandated functions of the agency as contained in the GAA. These are interventions and measures identified in the GAD plan to be implemented during the budget year. In the case of the LGUs, these interventions are referred to as the Plans/Programs/Activities (PPAs)
- GAD Performance Indicator identify the GAD indicator that measures the desired final output of the activities identified in the agency GAD Plan.

Targets - indicate the expected GAD accomplishments for the budget year.

This form shall be submitted by the agency/GOCC/LGU, GAD Focal Point Chairperson, and approved by the Agency Head.

GENDER AND DEVELOPMENT (GAD) BUDGET

FY

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Department: Department of Agrarian Reform Agency/GOCC/LGU: Office of the Secretary	rian Reform e Secretary					
Statement of GAD Plan Objective	Statement of GAD Plan Objective/s: To accelerate efforts in mainstreaming and sustaining GAD policies, programs and project	ing and sustaining GAD) policies, pro	grams and pr	oject	
GENDER-RELATED ISSUE/ CONCERN	IDENTIFIED GAD ACTIVITY	PROGRAM/ ACTIVITY PROJECT (PAP)	2000 Actual	2001 Estimate	2002 Proposed	2003 Projected
Only 18% of total beneficiaries issued with individual CLOAs are women	Review, improve and develop CARP policies/ guidelines on land acquisition, e.g. holders of CLOA, Emancipation Patients, Leasehold Contracts and as beneficiary of stock distribution option and production-profit sharing schemes and in the settlement of agrarian reform cases	Land Distribution and Acquisition	11,489	12,647	12,751	12,045
Low level of awareness of women of their rights and roles as CARP beneficiaries	Information dissemination of the right of women beneficiaries Provide opportunities for women to participate in various LTI activities, e.g. formulation of CARP-LTI operational plans, identification of qualified, identification of qualified beneficiaries, negotiations with land owners, settlement of agrarian conflicts	Agrarian Legal Assistance	1,684	2,040	4,808	5,066

Appendix D

GENDER AND DEVELOPMENT (GAD) BUDGET

FY 2002

Part 2 of 2

Sample unin	Statement of GAD Plan Objective/s: To accelerate efforts in mainstreaming and sustaining GAD policies, programs and project	PROGRAM/ ACTIVITY/	as which Physical Infrastructure Support Services (ECOPISS) and allows Infrastructure	cuve and Income-generating and livelihood projects		stallation education e CARP a) gender-related training		P30,068 P29,437 P33,087 P51,882	ROVED BY:		Secretary VXX	> CX
g and sustaining GAD SAM/ ACTIVITY/ 2000 PROJECT P			upport PISS)	-generating slihood s	Φ 0	ing and on er-related	rvisory	PS			FNC	
erate efforts in mainstreaming			<u>ه</u> .	s their				Total	APPROVED BY:	Secretary Vxx	HEAD OF OFFICE/AGI	
:	an Objective/s: 10 accel	IDENTIFIED GAD ACTIVITY (2)		women to be economicany active and that which recognizes women leadership roles and promotes their participation in decision-making	Develop and up date training modules and IEC materials to include GAD and/ or new concerns on GAD	Conduct orientation on the installation of the GRM & E system in the CARP MIS	Produce documentary film or slides to showcase the involvement of women agents/ beneficiaries -			Xyz	DCAT POINT	
	Statement of GAD Pla	GENDER-RELATED ISSUE/ CONCERN (1)	Women have limited access to and control of CARP resources and benefits		Limited capacities and gender-orientation of managers and field	implementors in integrating WID/GAD concerns in ARC development			SUBMITTED BY:	Undersecretary Xyz	Chaimerson GAD FOCAL POINT	

Gender and Development (GAD) Budget

This form presents a summary and an aggregation of the agency GAD Budget for four years; the past (actual), current (estimate), budget (proposed), and the projected.

- Statement of the GAD Plan Objectives provide the agency over-all thrust, priorities addressing specific gender issues.
- Gender Related Issue/Concern indicate the gender issues identified by the NCRFW which form part of the agency GAD plan to be addressed during the budget year.
- Identified GAD Activity provide a statement of a work process, which contributes to the implementation of a GAD program, sub-program or project. This refers to specific task to be undertaken to implement the GAD Plan.
- Program/Activity/Project (PAP) identify the mandated functions of the agency as contained in the GAA. These are interventions and measures identified in the GAD plan to be implemented during the budget year.
- FY 2000 (Actual) represent the actual obligations for the year 2000 for GAD activities.
- FY 2001 (Estimate) indicate the amount included in the FY 2000 reenacted budget. In the case of GOCC, reflect the actual amount contained in their corporate operating budget.
- FY 2002 (Proposed) provide the proposed budgetary requirements for GAD activities for the budget year.
- FY 2003 (Projected) indicate the budgetary requirements of GAD activities as included in the three-year GAD Plan

This form shall be submitted by the agency/GOCC/LGU GAD Focal Point Chairperson and approved by the Agency Head.

Annual Accomplishment Report on Gender and Development for the year 2000

Department: Department of Environment and Natural Resources

Agency/GOCC/LGU: Office of the Secretary

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Annual Accomplishment Report for Gender and Development

This form shall be used in reporting actual agency GAD accomplishments and utilization of the GAD budget.

- Gender-related Issue/Concern indicate the gender issues identified by the agency and were included in the NCRFW-endorsed GAD Plan.
- Program/Activity/Project (PAP) identify the mandated functions of the agency as contained in the General Appropriations Act. This refers to interventions and measures identified in the GAD plan to be implemented during the budget year. In the case of the LGUs, these interventions are referred to as the Plans/Programs/Activities (PPAs).
- Identified GAD Activity provide a statement of a work process, which contributes to the implementation of a GAD program, sub-program or project. This refers to specific task undertaken to implement the GAD Plan.
- Authorized Appropriations provide the amount allocated for the specific GAD activity under the approved General Appropriations Act/Reenacted GAA or the annual and supplemental LGU budget/s or approved Corporate Operating Budget/s of the GOCCs, as the case maybe.
- Amount Released indicate the total Notice of Cash Allocation (NCA) issued by the DBM under the specific PAP where the GAD activity is lodged. In the case of LGUs and GOCCs, the amount released is the actual amount authorized and spent for GAD activities.
- Amount Obligated indicate the actual obligations of the agency/LGU/GOCC for a specific GAD activity.
- % Utilized indicate the percentage of the amount obligated over the total amount released.
- GAD Performance Indicator provide the GAD indicator identified in the agency GAD Plan.
- Accomplishment indicate the actual GAD achievements for the year. These accomplishments can be expressed in numbers, percentages or ratios.
 - Target refers to the projected accomplishment as originally estimated during the budget preparation.
 - Actual refers to the specific number of services rendered or goods delivered. % of accomplishment refers to the ratio of actual against the targeted accomplishment.
- Remarks –provide a narrative explanation of the non-quantifiable indicator, if any.
- This form shall be submitted by the agency/LGU/GOCC, GAD Focal Point Chairperson and approved by the Agency Head.

GLOSSARY

Agency. Any of the various units of government, including a department, bureau, office, state university and college, school, instrumentality, government-owned and -controlled corporation, or a local government unit or its district unit.

Agency Head. The top or highest official of an agency, state university and college, government-owned and/or controlled corporation, or a local chief executive of a local government unit.

Client-focused GAD Activity. A work process integrated within an agency's PAPs that seek to address gender issues or concerns of its clientele. This also includes capability building on GAD for people in the agency to enhance their services for their clients.

Existing Program/Activity/Project (PAP). The mandated functions of the agency as contained in the General Appropriations Act.

GAD Activity. A work process that contributes to the implementation of a GAD program, sub-program or project; a specific task undertaken to implement the GAD Plan or respond to gender-related issues.

GAD Budget. The cost of financing the GAD Plan of an agency, GOCC and LGU for the year.

GAD Focal Point System. A mechanism that serves as a technical working group that catalyzes, coordinates, directs and facilitates the preparation, implementation and monitoring of an agency's GAD Plan.

GAD Objectives. The agency's over-all thrust and priorities to address specific gender issues.

GAD Performance Indicator. A measurement of an agency's major final output which is consistent with the Organization Performance Indicator Framework of the DBM and NEDA.

GAD Perspective. The ability to analyze the socio-economic, political, cultural and psychological levels of an issue to understand how the difference between the sexes affect and are affected by policies, programs and projects. It assesses how these factors relate to discrimination based on sex and how they impose obstacles to a person's opportunities and self-development.

GAD Plan. A systematically designed set of programs, activities and projects carried out by agencies for a given period of time to address gender issues and concerns of their respective sectors and constituents, specify the targets to be achieved, and identifies the performance indicators that will measure their accomplishments.

GAD Policy. A statement and pronouncement issued and promulgated to support GAD.

GAD Target. Expected GAD accomplishments for the budget year.

Gender and Development. An approach to development focusing on social, economic, political and cultural forces that determine how differently women and men participate in, benefit from, and control project resources and activities. It shifts the focus from women as a group to the socially determined relations between women and men.

Gender Institutionalization. The systematic and sustained inclusion of GAD concerns in the planning, programming, budgeting, implementation and monitoring processes, particularly in formulating, assessing and updating the annual agency plan on a continuing basis. In the process, the bureaucracy acquires a GAD consciousness that serves as the foundation of government's commitments to gender equality and women's empowerment.

Gender Mainstreaming. A strategy to integrate women's and men's concerns and experiences in the design, implementation, monitoring and evaluation of policies, programs and projects in all political, economic and social agenda; an approach that situates gender equality issues at the center of broad policy decisions, institutional structures and resource allocation, and includes women's views and priorities in making decisions about development goals and processes.

Gender-related Issue and Concern. An issue, concern or problem arising from the different roles played by women and men and the relationship between them; an issue, concern or problem identified by an agency or the NCRFW which the agency's GAD Plan seeks to address during the budget year.

Mainstreaming Women. A strategy where initiatives are carried out so women can formulate and express their views and participate in decision making concerning development issues. It enables women to articulate their visions, interests, and needs in defining approaches and programs of government and in determining the overall development agenda.

Organization-focused GAD Activities. Work processes integrated within the agencies' PAPs that address gender issues within the organization. They include activities related to the management of the GAD Focal Point system and the continuing advocacy for GAD within the organization, especially to its top level officials.

Philippine Plan for Gender-Responsive Development (PPGD), 1995 - 2025. Government's 30-year perspective framework to pursue equality and development for women and men. It spells out the gender goals and issues of various sectors, policies, strategies and programs to address and implement them.

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