

Terms of Reference

Assessment of policies/programmes and budgets from gender perspective and advocacy

Project: Promoting Gender Responsive Policies in South East Europe

Type of contract: Institutional contract - Based on deliverables

Starting date: February 15th 2012

Expected duration of assignment: July 31st 2012

I. Background

Supporting national stakeholders in strengthening the responsiveness of plans and budgets to gender equality at all levels is one of the six key thematic priority areas of UN Women mandate.

Over the past two years, UN Women has provided support to national and local stakeholders in strengthening democratic governance and advancing women's rights through initiatives aimed at mainstreaming gender in policy planning and budgeting. At the same time, Gender Responsive Budgeting (GRB) has been identified as important tool for advancing gender equality in key national documents of the former Yugoslav Republic of Macedonia as the National Action Plan for Gender Equality, the newly adopted National Strategy for Reduction of Poverty and Social Exclusion as well as in several Local self-governments' operational plans for equal opportunities between women and men.

In accordance with government priorities and in line with UN Women mandate, support has been provided to government efforts in using GRB as a tool to advance gender equality and ensure that women's needs are incorporated in policies and related budgets. At the same time, technical assistance was provided to non-governmental organizations in building their capacities to analyze and monitor existing sectoral or local policies and budgets from gender perspective and advocate for policy change.

The long-term result of these initiatives is the incorporation of gender equality principles, perspectives and priorities in policy making and budgeting at national and local level, leading to greater accountability and transparency of public finances.

Worldwide reforms of the public finances system towards performance oriented budgeting and medium term planning have been introduced to allow for improved monitoring of revenues and expenditures and hence increased accountability of governments with regards public spending towards its citizens. In South East Europe, reforms towards multi-year planning and programme

budgeting have been enacted, although with different paths in single countries, which allows for integrating the gender perspective in the budgetary processes and more effective monitoring of public expenditures.

Although, SEE countries do not produce Citizens Budgets, a publication which includes a non-technical presentation of government budget and allows to citizens better and easier understanding of public expenditures still, civil society organizations in the SEE countries have started to actively monitor and question public expenditures by producing watchdog's reports.

Participation of citizens in the budgetary processes, either through consultations with local self-governments units at local level planning and budgeting, or through monitoring of expenditures at both, central and local level, will increase transparency and improve evaluation of outcomes of government actions. Participation of women in the local policy/budget planning and monitoring public expenditures from gender perspective is crucial so that government policies and public budgets are encompassing men's and women's needs and priorities.

II. Objective

The overall objective of the request for proposals is to support Civil Society Organisations (CSOs) initiatives aiming at assessing sectoral and/or local policies/programmes and budgets from gender perspective, providing recommendations for improving their gender responsiveness and advocating for change in policies and budget cycle.

- Proposals should focus (but are not limited): on identifying and assessing from gender perspective either central level policies or programmes and budgets in the area of social protection, rural development or local policies and budgets, including participatory processes¹ that are in the domain of the decentralized competencies of the local self government.

The proposals that will be taken into consideration for funding should fulfil the following basic criteria:

- Outline the objective of the analysis and specify if it's sectoral or local policy and budget
- Summarise the importance of the sector that will be analysed
- Contain brief description of the methodology that will be used for the assessment
- Give an overview of current availability of sex disaggregated data to support the analysis or provide alternative solution if sex disaggregated data are not available
- Devising advocacy briefs/campaigns that can be used to show the different impact of budgets on women and men or show the gender gap in resource allocation.

The objectives of this initiative is to further strengthen CSOs capacities on monitoring public policies and producing budgets watchdogs reports for the purpose of identifying challenges and generating recommendations that would lead to advocacy for changes in national/local policies addressing the different needs and priorities of women and men, girls and boys.

¹ The law on local self-government foresees mechanisms for citizens participation in local policy making and budgeting. See Official Gazzete n. 5/2002, articles 25-30 and 42.

III. Justification

Contrary to the so-called gender neutral policies, which address all citizens regardless of their gender, social status, ethnic belonging, disability etc., gender responsive policies are those that include different needs and priorities of women and men, girls and boys, allocate adequate resources to address these and measure their impact through specific indicators.

Although key responsibility in developing gender responsive policies and allocating public resources to support them remain with central and local government actors, civil society also play significant role in bringing the issue on the political agenda and render the government increasingly accountable towards the citizens. CSOs role can be twofold, participatory in the process of developing policies and resource allocation on one side, and monitoring in the assessment of their impact, on the other. In the first case, CSOs can be a lead driver in communicating with citizens and bringing their needs, priorities and perspectives to the attention of the local/central government. They can advocate with local self-governments units in enacting participatory policy planning and budgeting on one hand and support citizens in taking part or participating in these policies on the other. Secondly, CSOs, through their grassroots activism, or policy analysis and advocacy work, can assess how much central/local policies have been successful in addressing specific issues and targeting differently citizens, how much women and men, from different ethnic background, social strata have benefited from them and whether the resources have been sufficiently and properly allocated.

In the country, several policies and programmes, such as for example the National strategy for employment and for reduction of poverty and social exclusion, call for mainstreaming gender and set specific targets related to women or marginalised groups of women. In addition, specific programmes which are gender neutral, such as the programme for rural development, are supported by some affirmative actions targeting women specifically and contained in the instruction for its implementation. Still, despite this important progress, much more can be done. Tools for monitoring results of these policies should be in place and regularly monitored and other policies and programmes should be more gender responsive and or supported by affirmative actions.

Up to date, few gender budget analysis have been carried out with support from UN Women, such as the gender budget analysis of the employment and social protection policies, the gender appraisal of the impact of the new health reform on citizens, the costs of responding to domestic violence in the country, as well as the social protection and education programmes of two municipalities in the country. In some cases, the latter have produced revision of policies and/or re-allocation of resources, thanks to the monitoring and evidence based advocacy of the CSOs.

The current request for proposals is seeking to further support CSOs, in developing gender budget analysis and advocating for change of policies/programmes with the purpose of better response and improved accountability of central/local governments towards citizens, women and men.

IV. Scope of work/Deliverables

The Contractor is expected to conduct an assessment of sectoral or local policies/programmes or budgets from gender perspective and carryout advocacy activities/briefs with stakeholders for

engendering sectoral and/or local programmes or for identification of proper mechanisms for citizens participation in local policy planning and budgeting.

Specifically, the Contractor is expected to deliver:

- **Inception report**, delivered at the beginning of the assignment containing the following information: 1) Introductory part revealing information on the type of analysis that will be developed (sectoral policy analysis or local programme/policy analysis), the accessibility and availability of data to support the analysis, and whereas possible, clearly demonstrating gender relevant data supporting the need to carry out the analysis; 2) Methodology for conducting assessment of policies and budgets from gender perspective. The methodology should explain what analytical tools and methods will be used, how the analysis will be carried out (quantitative/qualitative research) and to which specific questions the analysis will aim at providing answers; 3) Type of advocacy activities to be carried out for the purpose of achieving what.
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- **An Intermediary report**, containing the first draft gender based analysis of policies/budgets. The intermediary report should respond to the objectives of the Assessment (as identified in the Inception report) and provide initial analysis of either 1) sectoral policy/programme in the thematic area identified above from gender perspective or 2) policy planning and budgeting process at local level and involvement of citizens and analysis of specific local development programme under decentralized responsibility of the local self-government unit.
- **Full Assessment of policy and budget from gender perspective** which will provide findings from the gender policy appraisal of policies and allocation of resources, results from field research on their impact on women and men and recommendations how to increase citizens participation, how to target better women and men and/or citizens at risk of social exclusion.
- **Advocacy materials or reports from event/s organized** with the aim of raising awareness and lobbying with national or local stakeholders for greater accountability towards citizens, women and men, with regards public policies and budgets.

V. Reporting

The Contractor will be responsible for providing regular reports to the Project Manager on progress of the assignment and consult any changes that may occur, in order to adjust the agreed work plan.

VI. Specific instructions

A: Description of the activities and services required

Deliverables and key activities	Indicative Timeline
Work Plan consulted with and approved by the UN Women Project Manager	End of week 1

Overview of existing policies/programmes data sources, initial meetings with relevant stakeholders. Review of all available studies, reports and other secondary data, meetings. Submission of Inception report including detailed methodology	End of week -3
Carry out all primary data collection (according to the methodology developed, obtain statistics from relevant institutions, interviews with stakeholders and beneficiaries if necessary; organize focus groups with beneficiaries, etc.)	Beginning of week 4- End of week 9
Analysis of primary data and first draft and presentation of preliminary findings	End of week 12
Validation by stakeholders	End of week 15
Final full report	End of week 18
Publication of the study print and online versions)	End of week 20
<ul style="list-style-type: none"> • Advocacy activities: Devising advocacy briefs that can be used to show the different impact of budgets on women and men or show the gender gap in resource allocation. • Direct Advocacy activities 	End of week 24

B: Qualification required

The contractor engaged to undertake the assignment must fulfil the following requirements:

Required Research Skills

1. Ability to review from gender perspective relevant documents, including local policies/programmes/budgets, reports about local problems and services, and relevant research reports.
2. Ability to appraise and analyze data sets and published statistics and resource allocations per unit and from gender perspective collected by government agencies, service providers and other organizations.
3. Ability to collect and interpret qualitative data (for example conduct interviews and/or organize focus groups discussions).

Subject Knowledge

1. Knowledge of strategic planning and budgeting process in the country at national and/or local level.
2. Knowledge of gender and/or gender budgeting tools and methods for analysis.
3. Preferably, knowledge of good practices of application of GRB tools for monitoring policies and advocacy in South East Europe and/or worldwide.
3. Preferably, awareness of relevant existing secondary information sources.

The contractor shall produce:

1. Copies of the Registration Form and the Statute of the NGO/Company
2. CVs of the GRB research team leader, proposed key personnel, including individual consultants/experts.

Minimum Qualifications of the GRB research study team leader

- University degree in economy, sociology, gender studies, human rights, development studies and/or other social science related areas relevant for the assignment; Advanced degree will be considered as an asset.
- Minimum of 3 years of country based work experience in the field of gender equality, economic empowerment of women and reduction of poverty, women participation in local governance, women's safety and other related issues
- Minimum of 2 years of work experience with the organization/entity submitting the offer for carrying the GRB research;
- Working level familiarity GRB tools and methods and best practices in the SEE region and worldwide would be considered an asset;
- Minimum of 2 years experience in research work, developing methodologies for similar studies, data collection and interpretation of quantitative and qualitative data;
- Language proficiency in both written and oral English and Macedonian. Knowledge of other local languages will be considered an asset.

Minimum Qualifications of the GRB research key personnel/experts

- University degree in relevant area, including but not limited to economy, sociology, gender studies, human rights, statistics and/or other social sciences;
- Minimum of 2 years country based experience in the field of gender equality, economic empowerment of women, reduction of poverty, human rights;
- Previous experience in at least 1 relevant research and or/studies on issues related to gender equality, economic empowerment, human rights, and/ or related issues;
- Working knowledge of both English and Macedonian.

C: Proposal content and form (see also Annex I – Instructions for Offerors and Annex V – Price schedule)

- The prospective Contractor should submit only brief concept of the proposed methodology (max 5 pages) for GRB Research based on short pre-assessment of the existing policies/programmes and available data and a brief concept for advocacy activities. Involvement of local women's organizations or grassroots groups engaged in the development of the study will be considered an asset. **The GRB Research methodology will be further developed in close consultation with UN Women GRP Project Manager.**

- The proposal should include clear timeline for the activities and submission of key deliverables;

D: Eligibility

Registered for profit or not-for-profit entities are eligible to submit proposals.

E: Payment schedule

UN Women shall advance 20% of the total amount for the project upon signature of the contract. The rest of the payments shall be done as per price schedule proposed by the Contractor and in line with expected deliverables and after the acceptance of invoices by UN Women.