

## Working Paper 4: Developing Gender Budgeting in Northern Ireland: Civil Society Training Pilot Evaluation Report

*Professor Joan Ballantine, Professor Ann Marie Gray, Dr Michelle Rouse, Dr Kellie Turtle*

### Executive Summary:

Progress towards the implementation of gender budgeting in Northern Ireland requires training and capacity building for civil society, public sector and political stakeholders. Academics at Ulster University and civil society advocates in the Northern Ireland Women's Budget Group have been developing training modules in a joint project funded by the Joseph Rowntree Charitable Trust. As part of the development process, a pilot program was offered to civil society organisations in three locations and with an option to join online. Baseline and endline surveys were conducted to obtain quantitative data about the impact of the training on participants' knowledge and understanding of gender budgeting and how it works. Qualitative data was also collected from the surveys and two focus groups that took place after the training was completed.

The findings of this impact assessment and evaluation demonstrate that participating in the training resulted in **higher levels of knowledge and understanding about what gender budgeting is and how it works**. Key themes in the qualitative data highlighted that the strengths of the training include the use of engaging videos, visuals and practical examples, stimulating discussions that support mutual learning, excellent facilitation by knowledgeable trainers and a flexible and accessible hybrid delivery model. Participants also reflected on the challenges of tailoring training materials for different stakeholder groups: there was general agreement that a targeted approach that reflects the specific roles of each stakeholder in supporting gender budgeting policy and practice was required. They emphasised that progress on gender budgeting had to be underpinned by a commitment to tackling gender equality from political and public sector stakeholders. Participants felt that training for civil servants should cover all the theoretical and technical knowledge necessary for the practical task of implementing effective gender budgeting mechanisms. They emphasised the commitment needed from political and public sector stakeholders to make this process a success. Overall, participants felt hopeful about the potential of gender budgeting to create meaningful impact in the lives of women and girls.

The views and experiences of civil society partners will help shape the future development of gender budgeting policy and practice in Northern Ireland. In response to this evaluation, the training project team have already developed an additional training module on gender equality that will address the knowledge gaps for stakeholders who do not have prior experience of working on gender equality policy. The findings from this evaluation report will be used to frame the next phase of training development which is aimed at senior civil servants.

## 1: Introduction

**Gender budgeting** has become established as an important mechanism for tackling gender inequality in many countries. The Organisation for Economic Co-operation and Development (OECD, 2023) reports that 60% of its member states now practice some form of gender responsive budgeting and there are a range of tools and approaches promoted as good practice by international organisations such as the International Monetary Fund (IMF), the United Nations and the World Bank.

**Gender budgeting** is a mechanism to bring about gender-equal change by examining the resources allocated to policy proposals, and their potential effects on women and men. It seeks to redistribute resources in a way that redresses imbalances in women and men's use of, access to, and benefit from public services and finances (Jubeto, 2010). Implementing gender budgeting requires a gendered analysis of national and local government policies, plans and budgets, and introducing measures to address the gender-differentiated impact of both resource allocation and revenue raising policies and practice (Khalifa and Scarparo, 2021). It is connected to the concept of gender mainstreaming in that gender budgeting can be understood as 'the application of gender mainstreaming in the budgetary process' (Downes et al., 2017, pg.2).

**Gender budgeting** requires government departments to analyse the different impact of a budget on people of different genders, starting as early in the budget cycle as possible. The aim of gender budgeting is to ensure that the distribution of resources creates more gender equal outcomes. Over time, gender analysis should become embedded at all stages of the budget process. Women's intersecting identities are also included in this analysis and policymakers are expected to promote these areas of equality as well. The implementation of gender budgeting should be responsive to the context but there are pre-existing models, tools and resources that can help inform the process (Ballantine et al., 2021).

**Gender budgeting** measures have been adopted in the other devolved regions of the UK and in the Republic Ireland (ROI):

### Ireland

**The Irish government expressed its commitment to gender equal budgeting in its 2016 Programme for a Partnership Government which it reiterated in the National Strategy for Women and Girls (Government of Ireland, 2016; Department of Justice and Equality, 2017).** Since 2018, gender considerations in the budgetary process have been included under the broader policy of equality budgeting, with gender used as a primary axis of equality (Nicol and Guven, 2021).

### Scotland

**The introduction in 2009 of Scotland's Equality Budget Statement (EBS) alongside the draft budget was the first of its kind in the UK, representing a tangible integration of equality analysis in the budget.** Work is ongoing within the Scottish government and the Equality and Budget Advisory Group (EBAG) to improve the quality of analysis and to develop new tools and processes. Additionally, the Equality Impact Assessment (EQIA) process in Scotland has been the focus of a practice development project in building gender competence in policy making, led by the WISE Research Centre at Caledonian University (O'Hagan et al., 2019).

## Wales

**The Welsh government commissioned a rapid review of gender equality that reported a significant disconnect between existing policy and budgetary processes (Chwarae Tag, 2018).** As part of the review, Ministers tasked the Wales Centre for Public Policy to provide independent evidence and expertise to inform the gender equality review, including an examination of tackling inequality through gender budgeting (O’Hagan et al., 2019). The Welsh government has also recently made a commitment to implement targets on gender budgeting in its 2021-2026 Programme for Government (Welsh Government, 2021).

## Northern Ireland

**The Northern Ireland administration significantly lags behind the other devolved UK regions, the ROI and many other OECD countries as no processes for undertaking gender budgeting have been adopted, despite strong civil society advocacy and increasing political support (Rouse et al., 2023).**

### 1.1 *Favourable Conditions: The Role of Training*

Academic research has developed a strong evidence base about what kind of conditions are necessary for gender budgeting to be accepted and implemented successfully (Downes & Nicol, 2020; Kovsted, 2010; Steccolini, 2019; Welham et al., 2018). For example, Quinn (2009) sets out the foundations of gender budgeting as an understanding of gender and gendered inequality in conjunction with a commitment, both at political and bureaucratic level, to address it. This requires strategy, administrative architecture and data. The European Institute for Gender Equality (EIGE) further indicates key enablers to gender budgeting as political will and leadership, high level commitment of public administrative institutions, improved technical capacity of civil servants, civil society engagement, and gender-disaggregated data (EIGE, 2017, pg. 5).

Angela O’Hagan (2015; 2016) developed a Framework of Favourable Conditions (FFC) for gender budgeting as a diagnostic tool to assess the extent to which the necessary contextual, institutional, and political elements are in place to support the adoption and implementation of gender budgeting. These include factors such as whether or not there are engaged women’s organisations, the level of understanding of budgetary processes, the presence of a clear conceptual framework for gender budgeting and a policy making climate that is generally pro-equality (O’Hagan & Nesom, 2023).

Scholars have also turned their attention to contexts where gender budgeting implementation is difficult, such as Jorge et al. (2023) who analyse problems experienced in Portugal. They highlight the importance of building the capacity of civil servants, arguing that ‘the effectiveness of gender budgeting clearly depends on the capabilities of the civil servants who need to implement it’ (2023:2). To address this, they suggest the need for appropriate tools and training. Jorge et al. conclude that the policy commitment to gender budgeting in Portugal was ultimately undermined by ‘weak political commitment and co-ordination, as well as [...] lack of appropriate technical capacity’ (2023: 8) including the fact that technical actors from both the budgetary and policy planning areas had limited knowledge of or sensitivity to gender equality issues (2023:7).

Combined, the body of existing research evidence demonstrates that training and capacity building is an important step towards developing gender budgeting and will play a key role in its success. The evidence highlights not only the need for increased technical capacity among civil servants with regards to developing and applying practical tools, but also suggests that all stakeholders should be supported to better understand the role gender budgeting can play in achieving gender equality.

## 1.2 Training Pilot Delivery

Civil society women's organisations play a pivotal role in creating favourable conditions for gender budgeting implementation. In Northern Ireland, there is existing interest in gender budgeting from the women's sector and its partners in equality and human rights organisations, disabled people's organisations, children's organisations and other sectors of civil society. The Northern Ireland Women's Budget Group (NIWBG) provides an accessible civil society platform for awareness raising and advocacy of the benefits of gender budgeting.

Ulster University academics developed a suite of training modules informed by research evidence on international gender budgeting best practice and the Northern Ireland policy and budgetary context. They worked with the NIWBG to pilot a training course on gender budgeting for civil society organisations, aimed at enhancing advocacy and obtaining feedback from key stakeholders that would influence the development of training for public sector and political actors.

The pilot comprised three modules and was delivered over three days in community-based settings: 'What is Gender Budgeting and Why Do We Need It?'; 'Demystifying the NI Budget and Applying a Gender Lens'; and 'Gender Budgeting in Action: Learning from Global Case Studies'. The opportunity to participate in the pilot was advertised to civil society stakeholders using email networks and social media channels.

### Gender Budgeting Training Pilot

Complete three modules delivered by Ulster University and NIWBG and help us shape the future of gender budgeting training in NI.

All sessions will include a hybrid online option.

#### 11th May, Derry, 9:30 - 3:00

St. Columb's Park House, 4 Limavady Road  
What is Gender Budgeting and Why Do We Need It?

#### 1st June, Belfast, 9:30 - 3:00

NICVA, 61 Duncairn Gardens  
Demystifying the NI Budget and Applying a Gender Lens

#### 8th June, Cookstown, 9:30 - 3:00

NIRWN, 20 Sandholes Road  
Gender Budgeting in Action: Learning from Global Case Studies

Visit <https://forms.office.com/e/BLqNnhFuy> to register



Workshops were delivered in Derry/Londonderry, Belfast and Cookstown to ensure good geographic spread across the region. All sessions were delivered in a hybrid model and were accessible online as well as in person. Additional barriers to participation were addressed through the provision of financial reimbursement for travel and care expenses. A total of 22 participants attended one or more workshops. Six participants attended all three workshops.

## 2. Evaluation Methodology

All participants in the training pilot were asked to complete baseline and endline surveys at the beginning and end of each workshop using the online survey platform JISC. Participants answered a series of questions about their levels of knowledge, understanding and confidence around different aspects of gender budgeting work that were tied to the learning objectives of each training module. Questions were expressed in the form of statements and participants were asked to rate their agreement/disagreement using a five-point Likert scale (1=disagree strongly, 2 = somewhat disagree, 3 = neither agree nor disagree, 4 = somewhat agree, 5=agree strongly). Qualitative data was also obtained through written feedback and two online focus groups. The focus group questions were designed to evaluate the effectiveness of the training for the civil society stakeholders engaged in the pilot and obtain their views on how the modules could be developed for the other stakeholder groups. The training evaluation and impact assessment research was approved by the ethics committee of the Ulster University Business School, Ulster University.

The analytical methods involved analysis of the average scores for each question on the baseline and endline surveys. Due to issues of confidentiality, it was not possible to track the scores of each individual participant throughout the training. However, the change in average scores at the beginning and end of each workshop provides a useful measurement of the training impact. The qualitative data was transcribed, and thematic analysis was undertaken in line with Braun and Clarke's (2006) six step data analysis process. The initial coding of the data was completed using NVIVO software. The themes were organised under the three key questions that the evaluation sought to address: what are the training needs of different stakeholders; what are the strengths and weaknesses of current training; and what are the priorities for future training development?

## 3. Findings

The findings from the evaluation and impact assessment research are reported in two sections. First, analysis of the quantitative data from the baseline and endline surveys demonstrates the impact of the training on participants' knowledge and understanding of gender budgeting principles and processes. Second, thematic analysis of the written answers on each survey and the focus group discussions is presented, allowing for more in-depth evaluation of the strengths and weaknesses of the training and areas for future development.



### 3.1 Quantitative Analysis

The average scores for all participants in each workshop were compared across the baseline and endline surveys, revealing increases in average scores across all survey questions: see Table 1 and Figures 1, 2 and 3. These findings affirm that the training has had a positive impact across all the learning objectives. A closer examination of the increase in scores indicates that the workshop where most impact was experienced was Workshop 3: ‘Gender Budgeting in Action: Learning from Global Case Studies’ (Figure 3). Thus, the largest increases in scores were observed for learning objectives that focus on the implementation of gender budgeting, including awareness of tools used elsewhere in the world, and an understanding of the influence of favourable conditions and barriers. Workshop 3 also contained the highest overall endline scores with 5 questions receiving average scores of 4.8 out of 5.

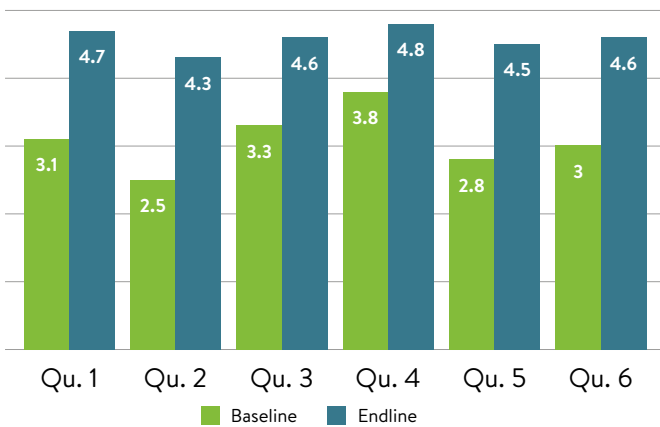
**Table 1: Increases in Average Scores Across all Workshops and Evaluation Questions**

Question	Increase in average scores
<b>Workshop 1</b>	
Qu. 1: I have a sound understanding of what gender budgeting is	1.6
Qu. 2: I am aware of different types of gender budgeting tools and how they work in practice	1.8
Qu. 3: I have a sound understanding of gender-based analysis	1.3
Qu. 4: I have a sound understanding of why we need gender budgeting	1.0
Qu. 5: I have a sound understanding of how gender budgeting can be implemented	1.7
Qu. 6: I know how to advocate for gender budgeting	1.6
<b>Workshop 2</b>	
Qu. 1: I have a sound understanding of the Northern Ireland budget process	1.6
Qu. 2: I have a sound understanding of the Northern Ireland budget and where it comes from	1.5
Qu. 3: I have a sound understanding of how to influence the Northern Ireland budget	1.2
Qu. 4: I have a sound understanding of what gender budgeting is	0.5
Qu. 5: I have a sound understanding of how gender budgeting can be incorporated into the Northern Ireland budget process	0.8
Qu. 6: I understand what it means to apply a gender lens to budgets	0.2
<b>Workshop 3</b>	
Qu. 1: I have a sound understanding of what gender budgeting is	0.8
Qu. 2: I have a sound understanding of how gender budgeting can be implemented	1.6
Qu. 3: I am aware of different types of gender budgeting tools and how they work in practice	2.4
Qu. 4: I am familiar with examples of gender budgeting working in practice in other countries	2.0
Qu. 5: I have a sound understanding of favourable conditions required to ensure gender budgeting is implemented effectively	2.3
Qu. 6: I have a sound understanding of barriers that exist to the effective implementation of gender budgeting	2.4

The smallest increases in scores occurred for Workshop 2: ‘Demystifying the NI budget and Applying a Gender Lens’ (Figure 2). This workshop also contained the lowest overall endline scores with averages of 4, 4.2 and 4.3 across the 6 learning objectives, suggesting that the smaller increases were not due to pre-existing knowledge. Whilst positive impact has been demonstrated in terms of improving participants’ understanding of the budget process and where the budget comes from, the civil society actors taking part in the pilot appear to have more hesitancy about how to influence the budget and apply a gendered lens. Workshop 1: ‘What is gender budgeting and why do we need it’ (Figure 1) provided strong increases across all learning objectives with the largest being observed in questions relating to awareness of practical tools for gender budgeting (Question 2) and an understanding of how these are implemented (Question 5). The improvements in knowledge about the practical application of gender budgeting strongly resonates with the findings from Workshop 3 (Figure 3) which also indicates participants found the practical, applied aspects of the gender budgeting training particularly useful.

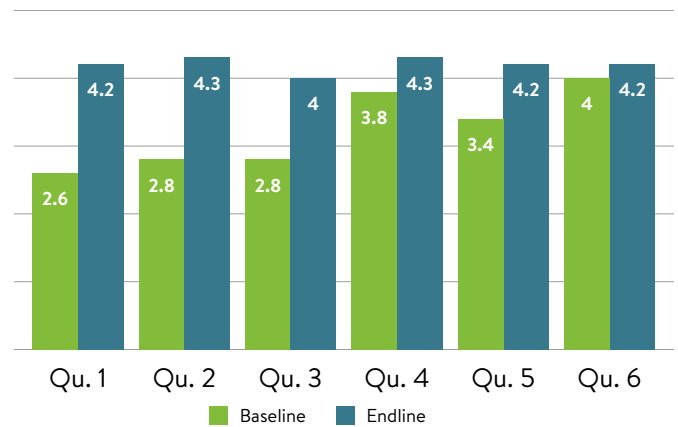
**Figure 1: Changes in Average Scores**

**Worshop 1: What is gender budgeting and why do we need it**



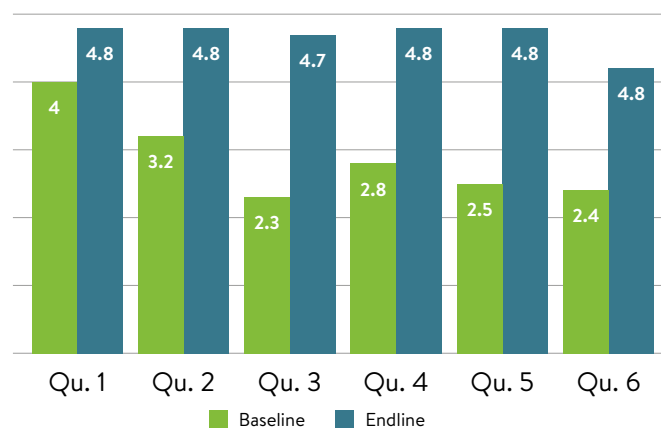
**Figure 2: Changes in Average Scores**

**Worshop 2: Demystifying the NI budget**



**Figure 3: Changes in Average Scores**

**Worshop 3: Gender budgeting in action. Learning from global case studies.**



### 3.2 Qualitative Analysis:

#### 3.2.1 Training Needs Identified

Pilot participants represented civil society organisation in the women’s, children’s, disabled people’s and equality and human rights sectors. They identified what they felt were their own training needs (in the qualitative sections of the baseline surveys) and the training needs of all stakeholders for gender budgeting (in the focus groups). Participants stressed that gender budgeting training should be tailored to meet the specific priorities of different stakeholder groups. The themes identified by pilot participants are summarised in Table 2.

**Table 2: Training Needs Identified by Pilot Participants**

Stakeholders	Civil society	Political representatives	Public officials
Key training priority for each stakeholder:	More effective advocacy (what)	Securing support (why)	Building capacity (how)
Training needs:	Building confidence	Prioritising gender equality	Equality knowledge
	Deeper understanding of what gender budgeting is	Demonstrate benefits of gender budgeting	Technical capacity for implementing gender budgeting

Participants’ views on training required for each of the above stakeholders are presented in the following discussion.

#### 3.2.2 Civil Society

As civil society actors, the majority of the pilot participants commented on their desire to be able to advocate more effectively on budgetary issues. This included both advocating directly for the implementation of gender budgeting processes in government but also to feel more confident lobbying on budgetary decisions that impact on their members and service users. For example:

I want to be able to advocate for the women’s organisation I work for, the women’s sector and the women and children we support. In a general sense, I understand how budget and spending decisions can disproportionately impact women, but I am not clear on how to change that (Baseline Survey: Workshop 1).

Participants felt that their priorities for training coalesced around better understanding of **what gender budgeting is** in order to have more **confidence** talking about it to policy makers and politicians. Some noted that they have been advocating for gender budgeting for some time but did not feel confident that they could answer questions on exactly what it is, or how it works. Reflecting on the impact of the training, some noted that providing a **deeper understanding** met a need for them in their advocacy roles.



For example:

I had a vague understanding of gender budgeting, but very vague at best. These sessions have helped me look at nuance and how a gender-neutral budget can increase existing inequalities. Being able to articulate the impact of public policy and budget decisions in a way that translates the real impact for the women I work for, will be a powerful tool going forward (Endline Survey: Workshop 3).

### 3.2.3 Political representatives

Feedback from the pilot participants made it clear that their priority in working with political representatives is framed around the need to secure support for gender budgeting implementation. Some indicated that training for the political representative stakeholder group needs should be aligned to convincing and persuading of the merits of gender budgeting. They also argued that improving political actors' knowledge and understanding of what gender budgeting is would also be an important part of that process. To that end, participants thought that politicians should be educated on **why gender budgeting is needed**. Many participants expressed concerns about the level of understanding of elected representatives with respect to gender inequality, which they argued was generally quite low. Additionally, even for those political representatives who understand gender equality, there is little urgency in terms of taking appropriate action to address it. This creates a need to support politicians to better **prioritise gender equality** and to appreciate the potential of gender budgeting to generate solutions. For example:

I trot out those Women's Resource and Development Agency stats that they've compiled in places where I think these people know this information, and they don't. People are really shocked when you start talking about it at all (Focus Group).

There needs to be a session on what gender inequality is. I very much understood this going in, but I think it's necessary to understand inequality before looking at gender budgeting to address it. It would possibly help with getting 'buy in' which was what many of us feel is missing at the minute (Endline Survey: Workshop 3).

A recurring theme in the discussion of the training needs to political representatives was the need to **demonstrate the benefits** of gender budgeting in terms that will resonate with this stakeholder group: this would include political wins and economic benefits.

With the political parties, you're going to have to tell them a little bit about what's in it for them, which is a bit cynical. But I think it's true (Focus Group).

If you can get the cost and the benefit side of things and demonstrate how maybe doing this [i.e., gender budgeting] actually long term saves money, I think that would help win people over (Focus Group).

### 3.2.4 Public officials

This stakeholder group were framed by participants as important due to their operational role in implementing policy commitments to gender budgeting. The priority for training this group was therefore identified as a focus on **how to do gender budgeting**, supported by a practical, applied approach to building their capacity. As with the political stakeholders, participants believed that before training took place on gender budgeting, public officials would benefit from training that improves their **awareness, knowledge and understanding of gender inequality** and its real-world impacts. For example:

The big challenge is the lack of understanding of gender inequality, or gender, amongst the officials (Focus Group).

The most important aspect of training for this group, however, was identified as practical knowledge that builds their technical capacity, through case studies from elsewhere, evidence that it is effective and worked examples that demonstrate how to apply gender budgeting mechanisms in their own context:

Public officials, they will tend to be much more practical. They don't set the agenda ... they do what they're told to do, but they'll want to know exactly how they're supposed to do it and do it well. So, they would be more interested in the nuts and bolts (Focus Group).

The participants of the pilot training include women's sector representatives, with considerable experience of attempting to influence policy on gender equality. In this context, some participants expressed their frustration at what was described as 'institutionalised misunderstanding' (Focus group 1) of the problem of gender inequality and how to address it. Feedback from participants therefore suggested that training for public officials would also need to be aimed at overcoming possible resistance, whether active or passive (Humphreys and Towl, 2023). For example:

In my view people from the [women's] sector usually have a degree of understanding about how much of a struggle it can be to transform institutional culture. Public sector organisations, officials and elected reps may need more time to come to grips with this, as the suggestion that attitudes need to change can sometimes be met with defensiveness (Endline Survey: Workshop 3).

It was argued that this process would require a certain amount of critical feedback but also involves engaging officials' awareness of the potential they have to make a positive impact:

The public officials need less on the how a budget works, and more on...here's what happens as a result of doing things the way you've done them. So it's showing rather than telling, but I think, don't be afraid to be fairly direct with them. And because they need...to be reminded that their decisions are not hands-off, just do my job. They make a real difference. And if they do this part of their job properly, they will make a real difference (Focus group 1).

It was also argued that demonstrating the wider benefits to public officials would be a useful tool in increasing the acceptance of gender budgeting:

Amongst the officials... thinking that gender budgeting is good budgeting, it's a logical way to go. Inequalities cost, you know, that's the way to go. And some would criticise that. But I think as long as we stay close to our feminist economic principles, we can take that line for now with the officials because we can't afford to wait until they understand gender equality (Focus group 1).

### 3.2.5 Strengths and Weakness of the Training

In general, feedback about the training was extremely positive, with many participants commenting on its usefulness and impact, using language such as 'excellent', 'outstanding' and 'incredibly informative'. Thematic analysis of the data highlights the following key strengths and weaknesses which were identified by the pilot participants (see Table 3).

**Table 3: Strengths and weaknesses of the current training**

Strengths	Weaknesses
Videos and visuals Practical examples and activities Learning from each other Skill and knowledge of trainers Flexibility in delivery model	No physical resources Length of time required Volume of information Online participation not ideal

#### 3.2.5.1 Strengths Identified:

The use of **visuals and videos** was highlighted as the most impactful mode of delivery used in the training. Reflecting this, the following comment was representative: 'the videos are what really, really sticks in my mind' (Focus Group). Videos were viewed as being a good vehicle for demonstrating real world examples of gender budgeting and visual representation of information through graphics and diagrams helped make the large amount of information easier to process. Graphic representations of gender budgeting processes were particularly welcome:

because it shows you...if it starts here, and we move this way, you know, this is the cycle, this is where we end up. So to me that's all really, really good (Focus Group).

**Practical examples** were highlighted in the baseline surveys as something participants hoped to get access to through the training. They were also identified as one of the most useful aspects of the training and a number of participants suggested that the training could be improved by the inclusion of more practical examples. When discussing the training needs of civil servants, there was a particular focus on the need for practical examples, and a suggestion that locally relevant worked examples could be developed:

Anything that gives wee examples that are things that they can relate to. You know, we could do that... So they feel like it's something that's achievable and that, you know, if we do this there is the potential for this to you know, this result to happen (Focus Group).

Similarly, participants felt their understanding of how gender budgeting works was enhanced by the use of **practical activities** that required them to consider case studies and worked examples:

One other thing that was really valuable was those little activities where we were all given policies...and we had to try and take a gender budgeting lens to them. I mean the one we got was about sports and it was as basic as going, wait a second, why have some of these sports been allocated like loads more money than the others? (Focus Group)

Continuing the theme of interactive training practice, discussion was considered to be valuable as it allowed participants to **learn from each other**. Creating even more space for discussion was highlighted as a suggested improvement to future training:

It was a safe space for discussions to take place which I feel impacted the engagement from us as a group (Endline Survey: Workshop 1).

I enjoyed how the pace was not too fast meaning there was enough time for thorough discussion where I think is where you learn the most (Endline Survey: Workshop 1).

I gained an awful lot from other participants (Focus Group).

**The skill and knowledge of the trainers** was identified as key a strength throughout the training pilot, with a number of participants commenting on how much they gained from the training facilitators. They were described as 'easy to listen to and engage with', 'professional but relatable and engaging', 'brilliant', 'so knowledgeable, and 'there wasn't a question they couldn't answer'. The volume of comments on the role of the trainers in ensuring the effectiveness and impact of the training should be noted as it suggests a need to ensure that future training delivery models are supported by the same level of subject matter expertise and training skills.

Whilst there was nuanced discussion about the hybrid delivery model of the pilot training, some participants did identify this as a strength as it created greater **flexibility and accessibility**, particularly for those in rural areas and those with caring responsibilities. The use of online meeting technology to create a positive hybrid experience was commended, with one participant noting: 'It was the best hybrid event I have been too, with success in letting those on zoom have a share of the experience in the room' (Endline Survey: Workshop 1). Another remote participant reflected:

For somebody who did it all remote, the hybrid worked well for me, because I would rather have been in the room because that's so valuable. So I was able to hear a lot of that, you know, the conversations that were going on within the room (Focus Group).

### 3.2.5.2 Weaknesses Identified:

When asked what was missing from the pilot training programme, the most common answer in both the endline surveys and the focus group discussions, was the **lack of physical resources** to accompany the sessions. Some participants suggested the use of a printed ‘workbook’ that would create both a reference tool and a practical aid for thinking through how to develop a gender budgeting process. Whilst the PowerPoint slides for each session were emailed to all participants afterwards, some felt it would have been more useful to have printed copies during the session ‘so you can make your own notes around some parts of them in case you need to refer back’ (Endline Survey: Workshop 2). Another participant noted that: ‘it would have been useful to be able to flick back and forth on key areas’ (Endline Survey: Workshop 2).

Participants also commented on the fact that engagement in the training requires a substantial **time commitment** that some stakeholders might not be able to commit to. This was presented as a dilemma with no easy resolution as it was acknowledged that the **volume of information** required to get a sound understanding of gender budgeting would be difficult to condense without losing its impact. This discussion was characterised by comments such as ‘it’s a lot of information coming at you at once’ (Focus Group) and ‘It is a little long time-wise for community groups to commit, could be done as two shorter sessions maybe?’ (Endline Survey: Workshop 3). However, others acknowledged that ‘you’ve already compressed a lot into three days’ (Focus Group). A possible solution to these issues would be to ensure that training is differentiated sufficiently for each stakeholder group, with targeted sessions that address their specific needs without duplicating existing knowledge or wasting time on less relevant aspects. As one participant commented:

don’t cut anything out, if you know what I mean in terms of the content, although I think rejig maybe the emphasis of where you’re spending your time (Focus Group).

Whilst some participants identified the hybrid delivery model as a strength of the training pilot, there was also some concern expressed that attending this sort of training **online is not ideal**. In particular, some participants argued that offering online training to civil servants might diminish its impact and limit the effectiveness of any future gender budgeting initiatives. Those with previous experience of delivering equality training to civil servants expressed strong opinions on how best to deliver with this cohort:

I would be adamant that political representatives and governmental people, they need to be in the room, they need to understand this, you know very clearly and not have this thing going in the background (Focus Group).

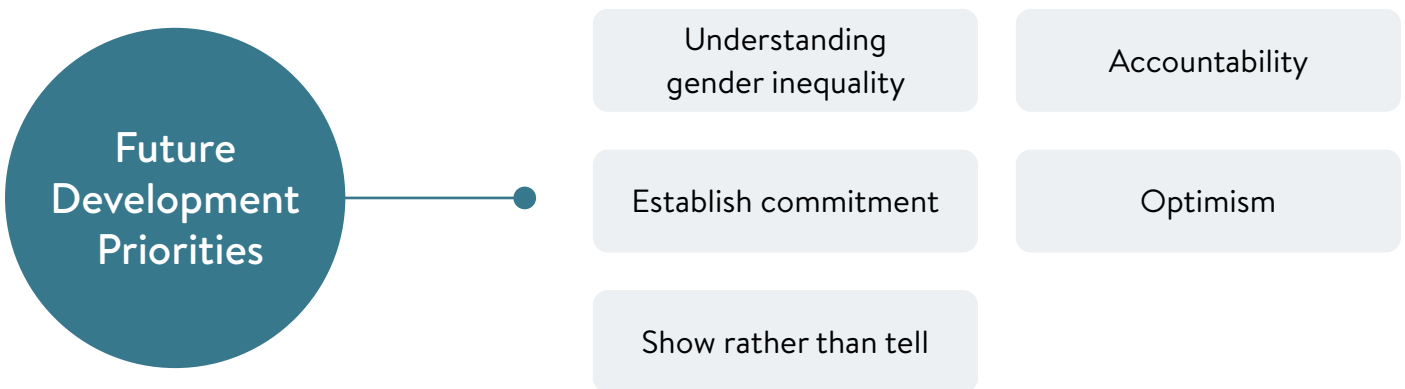
I really feel strongly because public servants have attended my training... What I will say is they’re there because they have to be there and they learn less than nothing. They come away with hostility toward you, because you took an hour out of their day ... rather than information. So I think when it comes to the mechanics of this, I would very much prefer that to be in person if at all possible (Focus Group).

So, you know, the hybrid works well for certain things, but for people that are making the decisions, no, be in the room, be engaged, be involved (Focus Group).

### 3.3 Future Development Priorities

As key actors in the development of gender budgeting policy, with an important advocacy role to play and experience of engaging with politicians and civil servants, civil society stakeholders are well placed to comment on the development of the pilot training for other audiences. Having had the opportunity to build their own knowledge and understanding around what exactly gender budgeting is, and how it works, the participants spoke from an informed perspective, sharing their views on what should be prioritised in the next phase. Table 4 provides a summary of the main development priorities identified by participants.

Figure 4: Summary of future development priorities



Civil society participants engaged in the pilot expressed concerns that a general **understanding of gender equality** amongst **political representatives and public officials** is currently lower than it would need to be for gender budgeting to be implemented effectively in the future. To address this, there were strong recommendations made to train those two stakeholder groups on the problem of gender inequality and what causes gender disparity as a ‘step before this training’ or a ‘separate layer’:

Possibly a session on what gender inequality is. I very much understood this going in but I think it’s necessary to understand inequality before looking at gender budgeting to address it. It would possibly help with getting ‘buy in’ which was what many of us felt is missing at the minute (Endline Survey: Workshop 3).

The focus group discussions revealed that this concern is based on participants’ experiences of having gender equality advocacy dismissed or de-prioritised and encountering politicians and officials who ‘think that gender inequality is a thing of the past’ (Focus Group).

As a starting point, gender inequality training was also framed as a significant element of **establishing commitment** from political and public sector stakeholders, something that civil society participants see as essential for the success of gender budgeting. This commitment was defined in terms of public officials’ willingness to engage in training and set aside the time required for such training:



It's getting them to commit to the sessions. I think once you have them in like, the training and the examples and all the exercises and that are, you know, it will be strong enough and good enough to make them think about the issues and the benefits of it. But it's getting them in the room that might be the most difficult bit (Focus Group).

Participants felt that commitment could be achieved through preparatory work with senior decision-makers and agreeing the parameters of the time commitment required in advance, noting 'the contract needs to be really clear' (Focus Group). Some participants also expressed the need for logistical compromise from the training team that takes into account the time pressures of stakeholders, particularly among political representatives.

As noted earlier, participants expressed confidence that the practical, applied training materials used in the pilot would provide an effective learning experience for those tasked with implementing gender budgeting. Alongside this, they also stressed the need for a supportive, enabling approach that demonstrates the benefits of gender budgeting and uses real world examples of gender budgeting to **'show' rather than 'tell'** how it is done. For example:

People get quite defensive, you know, when you come in with a list of 'you've done that wrong'. No, it's about, we have an opportunity here to help you with some of the areas that you need to improve on (Focus Group).

Additionally, suggestions were made by participants that civil servants could be motivated by understanding how gender budgeting practice might support or help them achieve other goals such as improving the overall transparency and effectiveness of the budget process:

There's a real acknowledgement, I think, that things are not working here in the way that they should. And I think with that comes an opportunity to act and say ... all these problems you have in relation to budgets and how you administer public services and all the heavy criticism you're coming in for. Well...we have a really good solution [i.e., gender budgeting] for you and we can help you...to do things better (Focus group).

In addition to favouring a training approach that is enabling rather than critical, the focus group discussions also revealed that civil society participants want to see accountability prioritised in their work with public officials. This was framed in terms of the serious impact budget decisions can have on women, particularly those bearing the brunt of social and economic inequalities:

They may not like that it's life and death, but the decisions that they make in their offices [are] very often life or death when it actually goes through all of the channels and comes out in what's in your pockets. They need to be reminded of that and they cannot shirk those duties (Focus Group).

Participants also highlighted their own roles as advocates for equality and expressed that gender budgeting training should imbue politicians and civil servants with a sense that such training must be delivered within a framework of scrutiny and accountability for improving gender equality. For example:

Even just knowing that there's somebody out there, I don't know, putting you under the microscope a wee bit and saying, listen, we know what your obligations are here...we know what you're supposed to be doing, how you're supposed to do. We want to help you to do it better, yes, but we will be following up with you as to whether you are or not (Focus Group).

It is also important to note that participants largely expressed feelings of optimism about the potential of gender budgeting to bring about the kind of redistributive transformation that existing gender equality policies have to date largely failed to deliver. Participants described their feelings about the future development and roll out of gender budgeting training as 'excited' and 'hopeful' (Focus Group). It should be noted that the training pilot took place in the immediate aftermath of the 2023 Westminster budget allocations, executed via the Northern Ireland Office, which have subsequently resulted in Executive departments announcing significant cuts to the community and voluntary sector that could have a serious impact on a number of the participants' own organisations. It is striking in that context that learning about gender budgeting felt like a possible solution to the barriers faced by many working for gender equality:

Hope is the bit for me, because we've been having a bit of a crisis of faith ... if I'm very honest. And we've had horrendous strategies published, we've had terrible funding decisions and we have all been feeling a bit of a, 'here, we may hang up our coats and go home because it's not working'. And I didn't feel like that coming out of this training ... I thought, no, come on, and it lit a fire in our bellies. So thank you for that as well (Focus Group).

#### **4. Conclusion and Next Steps:**

Interest in gender budgeting as an effective mechanism for addressing inequality is growing around the world. The policy commitments and practical measures implemented elsewhere in the UK and Ireland in recent years have left the NI administration in need of urgent action to address this gap in budgetary policy. Academic analysis of the favourable conditions for developing gender budgeting highlight the importance of advocacy by civil society organisations with gender expertise, political support for the process and technical capacity building for gender budgeting among public officials. This training pilot provides an evidence base that informs the development of these crucial elements in NI.

The analysis of baseline and endline surveys captures the impact of the three pilot workshops, demonstrating improvements in the knowledge and understanding of civil society actors with regard to what gender budgeting is, how it works, how the NI budget works and how existing gender budgeting tools could be applied. In addition to building the capacity of civil society advocates, the evaluation of the pilot provides insights into the future development and roll out of training to other important stakeholders. This includes identifying the training needs of each stakeholder group, exploring nuanced discussions of the most effective training delivery approaches in this new and challenging area of work, and proposing priorities for the next phase of training in order to support meaningful implementation of gender budgeting in government.

Framed from the perspective of civil society actors with significant experience in equality advocacy with politicians and civil servants, the participants highlighted areas of concern that merit consideration in the next phase of training development. This includes a perception that the broader understanding of gender inequality is low in NI and should be addressed before training on gender budgeting is progressed. Participants also expressed strong opinions on the need for active commitment and engagement from public sector stakeholders, suggesting that online training might not be the best delivery model for achieving this. Locating gender budgeting within wider accountability frameworks, linked to improvements in financial processes and statutory equality duties, was also emphasised by the civil society participants. Participants also expressed their optimism that gender budgeting might enable progress towards equality goals where previous policy interventions have failed.

In response to the feedback contained within this report, Ulster University has already developed an additional module on gender inequality which explores the structural causes of inequality, evidence of gender disparity through analysis of gender disaggregated data, and qualitative examples of the impact of gender inequality in women's lives. The next step in the training development process will be to engage with officials in the senior civil service and pursue opportunities to roll out training with relevant officials. The evidence of impact, priorities and recommendations articulated in this report will be used to frame the ongoing design of materials and delivery strategy to support the adoption and implementation of gender budgeting policy and practice in NI.

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<sup>1</sup>Professor Joan Ballantine, Professor Ann Marie Gray, Dr Michelle Rouse, Dr Kellie Turtle

<sup>2</sup>Working papers available for the Joseph Rowntree Charitable Trust programme include:

Ballantine, J. A., Rouse, M., & Gray, A. (2021). Gender Budgeting: What does the literature tell us? Lessons for Northern Ireland (NI). Access Research Knowledge (ARK) Working Paper Series. [https://www.ark.ac.uk/ARK/sites/default/files/2021-02/Gender\\_Budgeting-1.pdf](https://www.ark.ac.uk/ARK/sites/default/files/2021-02/Gender_Budgeting-1.pdf)

Ballantine, J. A., Rouse, M., & Gray, A. (2021). Gender Budgeting Case Study: Apprenticeships in Northern Ireland. Access Research Knowledge (ARK) Working Paper Series. [https://www.ark.ac.uk/ARK/sites/default/files/2021-02/Gender\\_Budgeting-2.pdf](https://www.ark.ac.uk/ARK/sites/default/files/2021-02/Gender_Budgeting-2.pdf)

Ballantine, J. A., Rouse, M., Gray, A., & Turtle, K. (2023). Gender Audit of the Northern Ireland Programme for Government 2016-21. Access Research Knowledge (ARK) Working Paper Series. [https://www.ark.ac.uk/ARK/sites/default/files/2023-03/Gender\\_Budgeting-3.pdf](https://www.ark.ac.uk/ARK/sites/default/files/2023-03/Gender_Budgeting-3.pdf)

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