

Priority: Medium
Action sought by: Tuesday 31 May 2022

Date: 24 May 2022
To: Hon Jan Tinetti, Minister for Women
From: Deborah Malcolm, Director, Policy
Contact: Anna Chapman, Senior Policy Analyst
Subject: **Review of the Gender Budgeting Pilot and next steps**

Recommendation(s)

The Ministry recommends that you:

1. **note** that the gender budgeting pilot took place between September 2021 and May 2022, and included 19 budget initiatives from Employment, Education and Training (EET) agencies and the Ministry of Education (MoE). **Noted**
2. **note** that while many of the Gender Assessment Templates (GATs) were completed as part of the pilot, several of the GATs did not provide a detailed assessment of the impact on wāhine. **Noted**
3. **note** that the gender budgeting pilot data will be used to establish a baseline to track the impact on women and girls identified in budget initiatives and how well this is explained. **Noted**
4. **note** that the Ministry will further develop gender budgeting training materials, including a refresh of the *Bringing Gender In* tool and Gender Budget Bid guide, to further strengthen gender-analysis capability across Government. **Noted**
5. **s 9(2)(g)(i)** [Redacted] **Noted**
6. **agree** to discuss the results of the gender budgeting pilot with Hon Grant Robertson, Minister of Finance and Hon Carmel Sepuloni, Minister for Social Development and Employment, **s 9(2)(f)(iv)** [Redacted] **Agree** disagree
7. **agree** to refer a copy of this briefing to Minister Robertson. **Agree** disagree

Proactive release

This briefing does not fall within the Ministry's guidelines to be published under the Ministry's proactive release of documents policy.

Noted

s 9(2)(a)

Deborah Malcolm
Director, Policy



Hon Jan Tinetti
Minister for Women

Date: 30/05/2022

Purpose

1. This briefing provides you with a review of the Gender Budgeting Pilot, as agreed between you and the Minister of Finance in August 2021 [MW 21-22 0088 refers].
2. This briefing also provides you with potential options for the next steps for gender budgeting, including:
 - recommending a meeting with Minister Robertson to discuss the results of the gender pilot project; and
 - potential collaboration with the University of Auckland to further develop the gender budgeting resources.

Background

3. Gender budgeting can help improve gender equality by identifying and classifying expenditure that is likely to have a positive or negative impact on women. It can be used to uncover any unintended consequences or outcomes of fiscal policy on women and girls, and identify the amount spent on programmes for women, signal the potential economic value in improving women's economic situation, and outline the difference between men and women's economic positions.
4. In August 2021, officials provided you with a briefing on the benefits of gender budgeting, which included advice on different international models and possible approaches for New Zealand [MW 20-21 0331 refers].
5. In August 2021, you, Minister Sepuloni and Minister Robertson agreed to a gender budgeting pilot for Budget 2022 which would focus on approximately 15-20 Employment, Education, and Training (EET) initiatives. Ministry of Education (MoE) were also invited to participate. The purpose of the pilot was to apply a gender lens across these budget initiatives to identify policies that had a direct and/or indirect impact on improving outcomes for women and girls, including wāhine Māori.
6. In September 2021, you wrote to Minister Robertson and included a gender budgeting guide (completed with information from the Canadian Government's best practice) and highlighted how the Ministry's *Bringing Gender In* tool could be used to increase gender analysis capability across government [MW 21-22 0088 refers].
7. Officials provided Treasury with a copy of the rapid assessment of the GATs on 21 December 2021. In February 2022, we provided an overall summary of the Gender Budgeting Pilot to be included in materials provided to the Budget Ministers.
8. A full timeline of the gender budgeting pilot is supplied as **Appendix One**.

Gender budgeting pilot

9. The gender budgeting pilot took place between September 2021 and May 2022. The pilot was intended to incorporate a gender lens across initiatives, to identify policies that had a direct and/or indirect impact on improving outcomes for women and girls and policies that have a negative or unintended effect on women so that these effects could be challenged and/or amended. The Ministry developed a Gender Analysis Template (GAT) for agencies to complete. A copy of this is provided as **Appendix Two**.
10. The EET agencies selected to participate in the pilot included: the Ministry of Business, Innovation and Employment (MBIE), Te Puni Kōkiri (TPK), Ministry for Pacific Peoples (MPP), and Ministry of Social Development (MSD). The Ministry of Education (MoE) was also invited to participate.
11. Agencies were asked three key questions in the GAT:
 - What kind of impact does the initiative have on women and girls overall?
 - What kind of impact does the initiative have on wāhine Māori?
 - Does the initiative impact on another specific group of women and girls?
12. In addition, agencies were asked how their initiative specifically related to the Government's Wellbeing Objectives, and whether the impact was proportionally beneficial to wāhine. The five Government Wellbeing Objectives include: Just Transition, Future of Work, Māori and Pacific, Child Wellbeing and Physical and Mental Wellbeing.
13. The Ministry ran three gender-analysis workshops to support the agencies who participated in the pilot. The workshops provided information on how agencies could undertake gender analysis as part of their initiatives and training on how to use the *Bringing Gender In* tool.
14. In December 2021, the Ministry completed a rapid assessment of the gender analysis contained within each initiative. A copy of this was provided to Treasury on 21 December and circulated to the Vote teams to support their assessments. A copy of this rapid assessment is included as **Appendix Three**.

Assessment of the budget initiatives

15. A total of 19 budget initiatives were included in the pilot: 14 were EET initiatives, and five initiatives were from MoE. 17 initiatives included a GAT which was completed to varying degrees, and two did not include the GAT.
16. The rapid review found that the budget initiatives often identified an impact on women but that there was room for significant improvement. Overall, the majority of initiatives provided basic observations about the likely impacts on women, but many did not provide supporting data, evidence, or consider whether there would be any barriers within the budget initiative for women.

17. There was a strong impact for wāhine identified across the 17 initiatives that completed the GAT, particularly for wāhine Māori and Pacific women. In response to three questions asked:
- All the initiatives (100%) signalled an impact for women and girls, whether direct or indirect. 94% (16 initiatives) identified a direct impact, and nearly half (47% or eight initiatives) identified a disproportionately positive impact.
 - Nearly all initiatives identified an impact for wāhine Māori (94% or 16 initiatives). Of those, 13 initiatives (81%) identified a direct impact and half (56% or 9 initiatives) identified a disproportionately positive impact.
 - Nearly two-thirds of initiatives (65%, or 11 initiatives) identified other groups of women and girls impacted by the initiative, such as: refugee women and girls, women and girls with disabilities, rainbow youth and gender-diverse, remote students and at-risk students, and students with learning disabilities.
18. There were several overlaps in the initiatives that aim to improve outcomes for Māori and Pacific populations that would result in benefits to wāhine (directly or indirectly) as a proportion of this demographic. This shows that initiatives that target specific population cohorts can also have direct benefits for wāhine and supports the need to incorporate a strong gender lens in these initiatives.
19. In-depth analysis on the impact of the budget initiatives on women was not carried out in all of the GATs. Undertaking a deeper analysis could have provided information on how to mitigate or tailor the impacts of initiatives on women and/or amend policies that could have a negative or unintended effect on women. The Ministry will continue to build gender-analysis capability across Government, which would help strengthen the gender-lens applied in initiatives going forwards.
20. The Ministry has identified that potentially eleven of the pilot initiatives were successful in Budget 2022 [MW 21-22 0305 refers].¹ The positive impact on women and girls identified during the pilot helped with reviewing the gendered impacts of the overall budget.
21. A full breakdown of results is at **Appendix Four**.

Post-Budget 2022

22. Treasury will undertake a Budget review process to reflect on all elements of the decision-making process. This review occurs annually. The Ministry will continue to work with Treasury on how a gender lens can continue to be applied to the Budget initiatives and decision-making processes.
23. s 9(2)(g)(i) [REDACTED]
[REDACTED] We will use this Budget review process to clarify the impact these assessments have had in this process.

¹ It is not always clear which initiatives were successful as the titles have changed throughout the budget process. The Ministry will confirm this number with Treasury post-Budget.

Next steps

24. Gender budgeting adds a valuable lens to the budget process. The gender budgeting pilot has highlighted that there is an opportunity to identify the impacts initiatives have on women and girls so that these can be adequately considered.
25. We propose that the data from the gender budgeting pilot is used to establish a baseline to track the impact on women and girls identified in the initiatives (whether direct and indirect), and how well this is captured and expanded upon in the GAT.
26. We recommend that you meet with Minister Robertson and Minister Sepuloni to discuss the results of the gender budgeting pilot s 9(2)(f)(iv) [REDACTED]
27. Should you agree, we will provide you with talking points for this discussion.

Supporting an on-going gender budgeting initiative

28. To support an on-going gender budgeting initiative, the Ministry will:
 - review the *Bringing Gender In* tool and undertake more comprehensive training to increase understanding of gender analysis across the public sector; and
 - re-develop the current gender budgeting materials and guidelines and undertake training specifically on gender budgeting.
29. In developing these tools, we would like to collaborate with the University of Auckland's Public Policy Institute Gender Responsive Analysis and Budgeting ([GRAB-NZ](#)) project, which is being led by Professor Jennifer Curtin.
30. s 9(2)(a) [REDACTED]
31. The GRAB-NZ project examines a range of data, methods and capability building strategies to identify ways to advance gender inclusive policy and improve the wellbeing of all women across Aotearoa New Zealand. Launched in 2018, the project is currently funded by the MBIE Smart Ideas Fund until September 2022.²

32. s 9(2)(b)(ii) [REDACTED] s 9(2)(g)(i) [REDACTED]

² s 9(2)(b)(ii) [REDACTED]

<https://www.grab-nz.ac.nz/about-us-2/>

Appendix One: Timeline of the gender budgeting pilot

August 2021	<ul style="list-style-type: none">• Advice provided to Minister Tinetti on the advantages of gender budgeting. Minister Tinetti and Minister Robertson agreed to conduct a gender budgeting pilot for Budget 2022 focusing on EET initiatives.
September 2021	<ul style="list-style-type: none">• Minister Tinetti wrote to Minister Robertson and provided a written Guide to Gender Budgeting. MfW and TSY finalised a gender budget initiative template, the Gender Analysis Template (GAT).
October 2021	<ul style="list-style-type: none">• MfW and TSY identified and selected a series of EET budget initiatives to participate in the pilot. Agencies included MBIE, Te Puni Kōkiri, MPP, MSD, and MoE.
Oct-Nov 2021	<ul style="list-style-type: none">• MfW ran four training workshops with participating agencies on utilising the Bringing Gender In tool, to support them to undertake gender analysis when preparing the budget initiatives and GATs.
December 2021	<ul style="list-style-type: none">• MfW conducted a Rapid Assessment of the selected Budget initiatives and GATs completed by the participating agencies.• A copy of this analysis was provided to Treasury.
January 2022	<ul style="list-style-type: none">• TSY considered the analysis from MfW. Findings from the Rapid Assessment fed into the overall assessment and ranking of initiatives for inclusion in the Budget Package. Treasury Vote Team assessments due 21 January 2022
February 2022	<ul style="list-style-type: none">• Draft budget package is presented to Budget Ministers.• MfW provided information on the review of the pilot to feed into Budget Minister Meeting powerpoint slides.
April 2022	<ul style="list-style-type: none">• Cabinet agrees to Budget 2022 Package on 4 April 2022.
May 2022	<ul style="list-style-type: none">• Announcement of the Budget on 19 May 2022.• MfW conducted a gender analysis of Budget 2022 [MW 21-22 0305 refers.]
Post-May 2022	<ul style="list-style-type: none">• MfW will partake in Treasury's Budget review process.• MfW will further develop gender budgeting training materials, with input from the University of Auckland.

Appendix Two: Gender Analysis Template (GAT)

Gender Initiative Assessment Template

In Budget 2022, select Employment, Education and Training (EET) initiatives will be required to use the Manatū Wāhine / Ministry for Women’s gender analysis tool “Bringing Gender In” to describe the gender implications of their initiatives. The template is designed to be used in conjunction with Manatū Wāhine / Ministry for Women’s gender analysis tool: “Bringing Gender In” available here: <https://women.govt.nz/gender-tool>. This tool is designed for general policy analysis processes, but the frameworks of how to think about gender will be useful in assisting you to complete this template. Ministry for Women have also attached a high-level draft guide that you can use to step through a gender analysis process.

Initiatives will be analysed for the magnitude of impact on women and girls, the demonstrable or clear intervention logic of investment and output directly supporting women/wāhine Māori and girls, and how the initiative supports women/wāhine Māori and girls within the Government’s wider wellbeing objectives – for example, will women be proportionally benefited from the impact and outcomes of the wellbeing objective that you describe?

Impacts on women and girls

This table summaries for assessment your gender analysis assessment of your initiative. There are spaces to outline the impact across all women and girls, specifically on wāhine Māori, and space to include impacts [if applicable] on other diverse groups of women.					
What kind of impact does the initiative have on wāhine Māori?	A	Direct	Indirect	No Impact	
	Please explain why the initiative falls under the category identified in A above?				
	B	Targeted and tailored for wāhine Māori	Disproportionate positive impact	Other explain	
Please explain why the initiative falls under the category identified in B above					
What kind of impact does the initiative have on women and girls?	A	Direct	Indirect	No Impact	
	Please explain why the initiative falls under the category identified in A above?				
	B	Targeted and tailored for women and girls	Disproportionate positive impact	Other explain	
Please explain why the initiative falls under the category identified in B above					
If the initiative impacts another specific group of women and girls, please detail the group and the impacts here.	A	Direct	Indirect	No Impact	
	Please explain why the initiative falls under the category identified in A above?				
	B	Targeted and tailored for [specific group]	Disproportionate positive impact	Other explain	
Please explain why the initiative falls under the category identified in B above.					

Contribution to the Government's Wellbeing Objectives

This table provides a space to outline the impact of your initiative on women / wāhine Māori specifically related to the Government's five Wellbeing Objectives. In this table, you will also need to consider the impact of the initiative and whether this impact is proportionally beneficial to women / wāhine.

Department to complete relevant sections. If not applicable, please fill in N/A. The Government's five wellbeing Objectives for Budget 2022 are:

- **Just Transition** - Supporting the transition to a climate-resilient, sustainable and low-emissions economy while building back from COVID-19
- **Future of Work** - Enabling all New Zealanders and New Zealand businesses to benefit from new technologies and lift productivity and wages through innovation, and support into employment those most affected by COVID-19, including women and young people
- **Māori and Pacific** - Lifting Māori and Pacific incomes, skills and opportunities, and combatting the impacts of COVID-19
- **Child Wellbeing** - Reducing child poverty and improving child wellbeing
- **Physical and Mental Wellbeing** - Supporting improved health outcomes for all New Zealanders and keeping COVID-19 out of our communities.

Alignment/ contribution to supporting women and girls to meet the Government's wellbeing objective(s)

What wellbeing objective(s) does this initiative align with/contribute to, how does this initiative support women and girls within this wellbeing objective?

Appendix Three: Rapid assessment of GATs

Rapid assessment of the gender analysis templates completed as part of the gender budgeting pilot.

s 9(2)(f)(iv)

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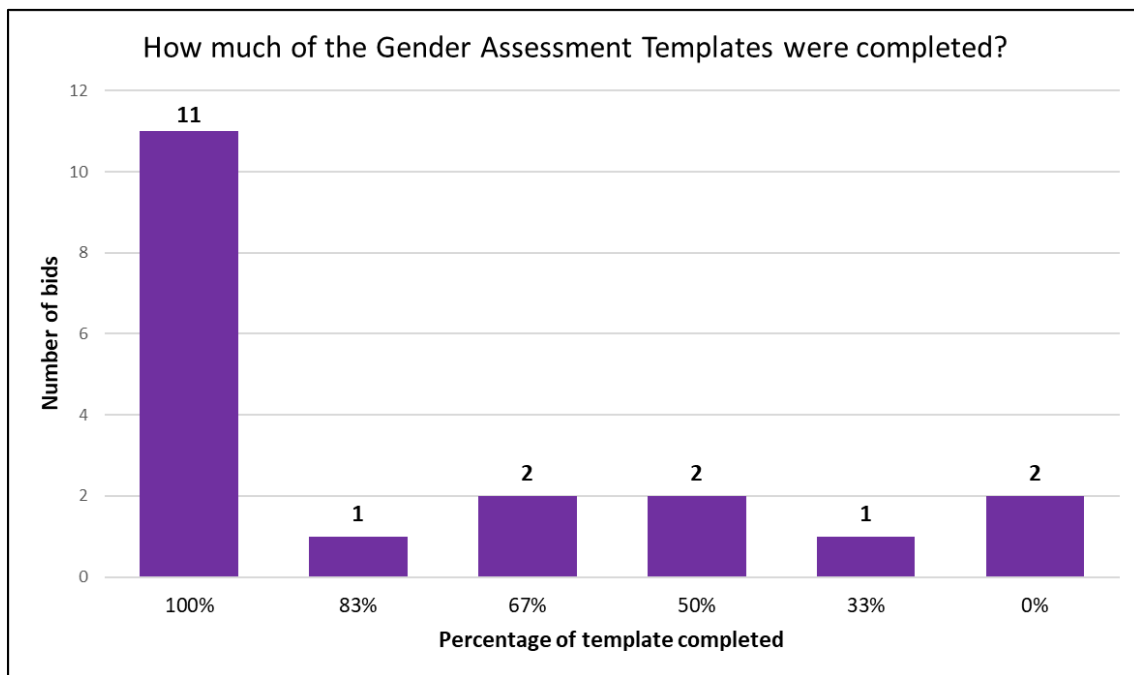
s 9(2)(f)(iv)

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Appendix Four: Results of the pilot

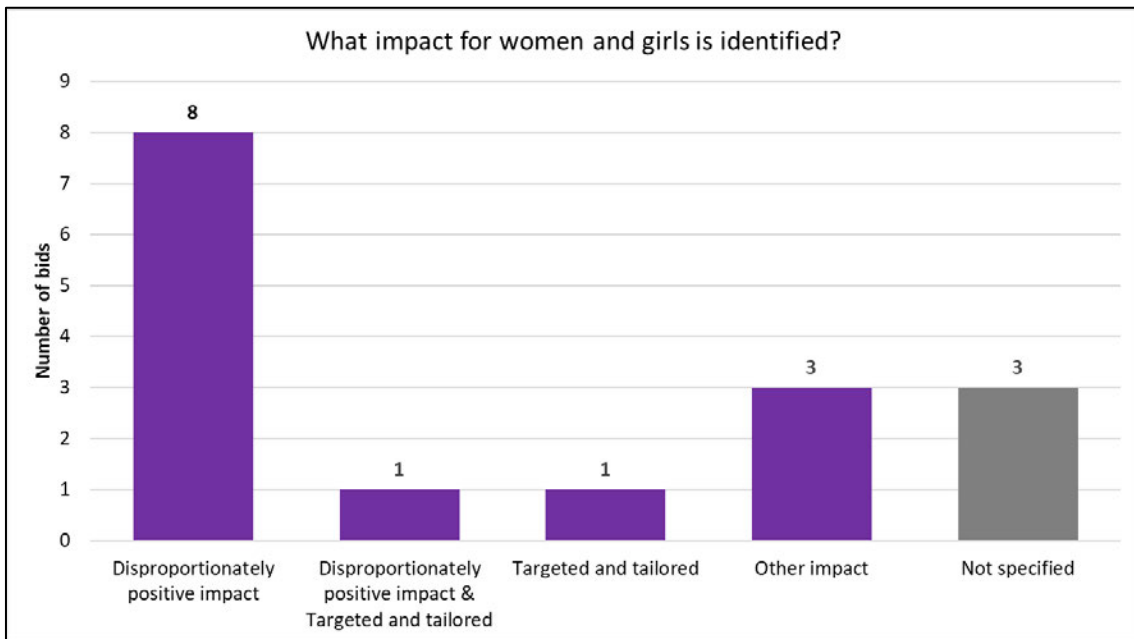
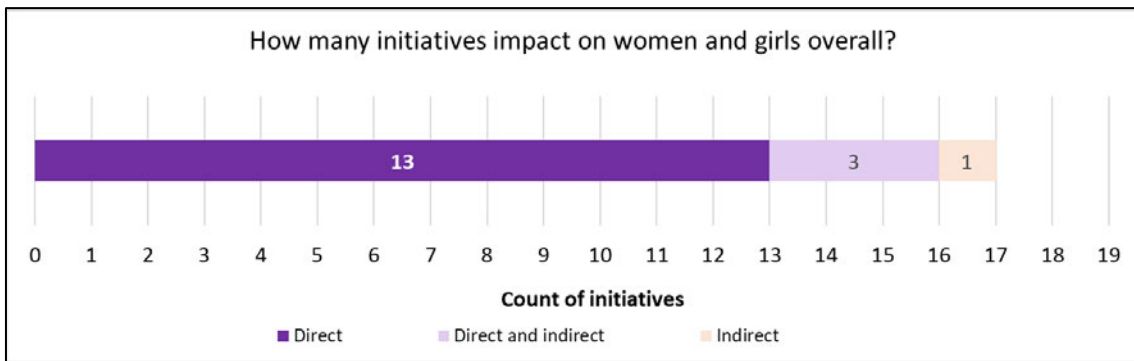
Of those 17 initiatives that completed the GAT:

- 65% (11 initiatives) completed the template in full, answering all the questions.
- Nearly all initiatives (16 initiatives or 94%) completed 50% or more of the template.
- In several cases, agencies identified women as a key demographic, or highlighted that women were represented in the demographic affected by the initiative. However, they did not always provide further information as to how the initiative specifically targeted or benefitted them.



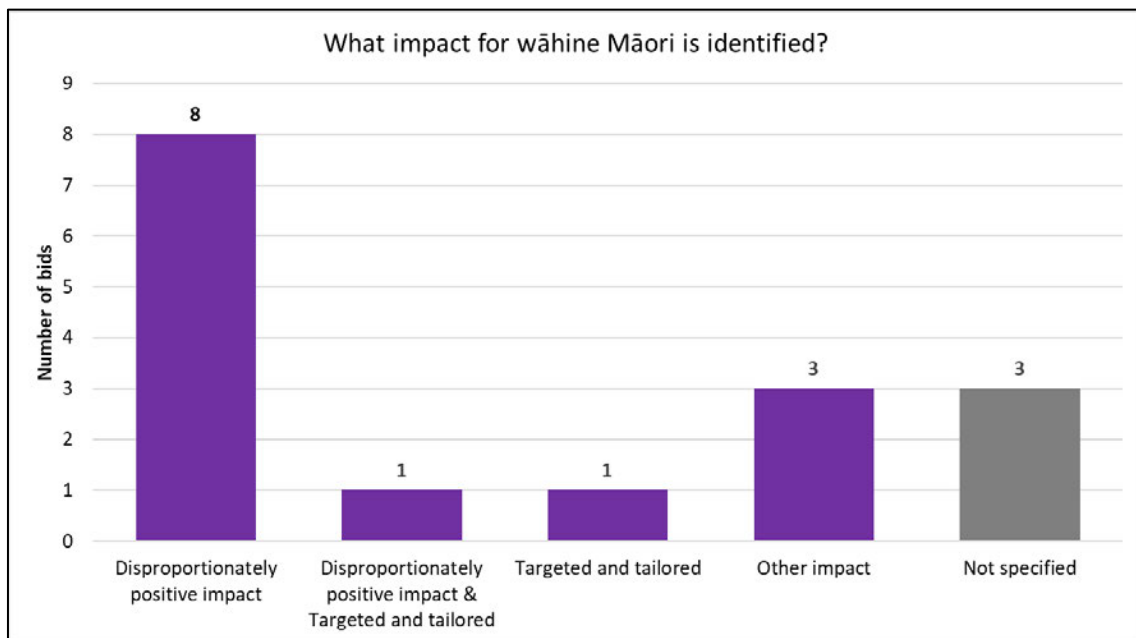
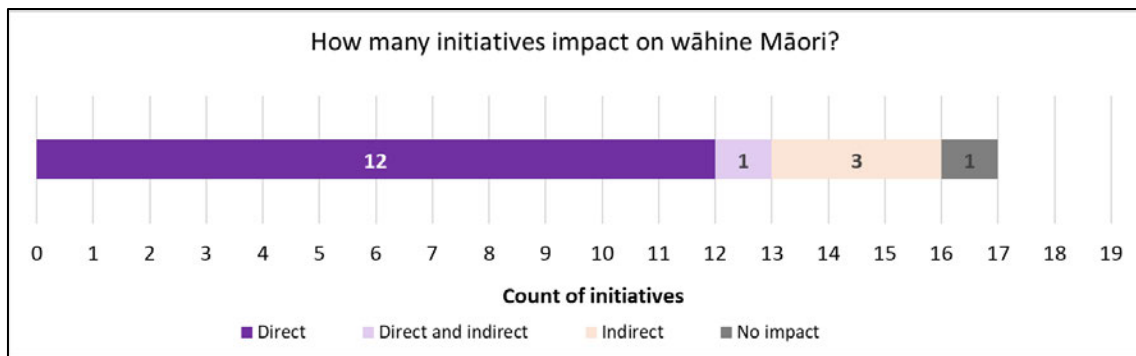
Impact on women and girls

- All of the initiatives highlighted an impact for women and girls (17 initiatives, 100%).
- 16 initiatives (94%) highlighted a direct impact for women and girls.
- Nearly half of these (8 initiatives or 47%) identified a disproportionately positive impact for women and girls, and two initiatives (12%) emphasized that they included targeted and tailored policy outcomes for women and girls.
- Three initiatives (18%) did not specify how exactly women and girls were impacted, suggesting a need for additional gender-analysis training across Government.



Impact on wāhine Māori

- Nearly all the initiatives (16 initiatives or 94%) highlighted an impact for wāhine Māori.
- Of those 16 initiatives, 13 initiatives (81%) highlighted a direct impact. The remaining three initiatives (19%) had an indirect impact.
- Over half of these, (9 initiatives or 56%), identified a disproportionately positive impact for wāhine Māori, and two initiatives emphasized that they included targeted and tailored policy outcomes for wāhine Māori.

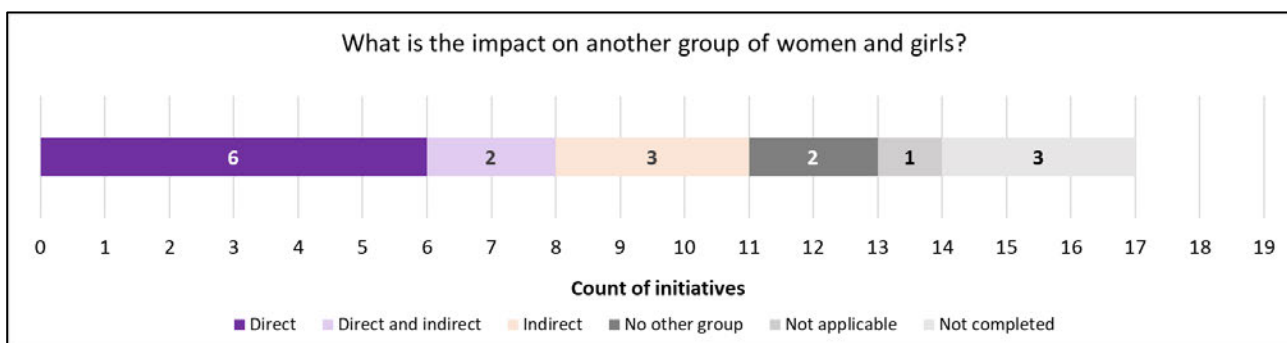


Impact on another specific group of women and girls

- In this section, agencies were asked if the initiative impacts on another specific group of women and girls (separate to wāhine Māori and all women and girls).
- Nearly two-thirds of initiatives (65% or 11 initiatives) identified another specific group of women and girls impacted by the initiative. Of those 11 initiatives:
 - The majority (eight initiatives or 73%) identified an impact on Pacific women and girls.
 - Six initiatives (55%) identified a disproportionately positive impact.
- These groups identified included: Pacific women; disabled women and girls; rainbow women, trans women, gender minorities and gender-diverse or non-binary students; remote students and at-risk students, and/or students with additional learning support needs; migrants and refugees; deaf women and girls; and teachers and teacher aides.
- Three initiatives (18%) completed this section but specified that there was no other group of women and girls affected, or that this was “not applicable”.
- Three initiatives (18%) did not complete this part of the form*.

s 9(2)(f)(iv)

This suggests that the form may need to be amended/improved further, or that more guidance is needed on how to complete the form.



Alignment with Government Wellbeing initiatives

Of the 17 initiatives with a completed GAT:

- 100% reported alignment with the Government’s Wellbeing Objectives.
- Over 80% of initiatives (14 initiatives, 82%) met two or more objectives. 37% (7 initiatives) met three or more objectives.
- 88% (15 initiatives) aligned with the Māori and Pacific objective, to lift Māori and Pacific incomes, skills and opportunities.
- 65% (11 initiatives) aligned with the Child objective, to reduce child poverty and improve child wellbeing.
- 65% (11 initiatives) aligned with the Physical and Mental objective to improve health outcomes for all New Zealanders.

