Reflecting on the experience of Well being gender budgeting.

Tindara Addabbo, Francesca Corrado, Antonella Picchio

Well_b_Lab*
spinoff University of Modena and Reggio Emilia

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**Introduction**

Feminist studies have developed several tools to assess the gender impact of public policy and of budgets in particular. Addabbo, Lanzi and Picchio (2010) introduced an innovative approach to the gender auditing of public budgets inspired by the capability approach. Well being gender budgets (WBGB) expand the scope of the assessment of the policy impact taking into account women’s multidimensional well-being and the contribution of their unpaid work to other people’s well-being. WBGB use a macro-economic feminist perspective to make the capability approach operational in the policy space. Within this extended reproductive approach, gender budgets aims at becoming a tool for advancing a reflection on social and individual well-being and for greater transparency on the gender division of labor, the distribution of resources and the share of individual and public responsibilities.

The approach has been used in different contexts in Italy (Addabbo, Badalassi, Corrado & Picchio, 2011) and in other countries and this paper reflects on the benefits to the public administrations that have adopted this innovative practice and their reflections in women and communities' well being.

The benefits range from specific policies like the attempt, made by a local administration located in Region Emilia Romagna that facing cuts in public spending to sustain child care services settled a network of institutions to keep the service alive, and the experience in a high school in Emilia Romagna that, through a participatory experience of well being gender budgets, introduces public spaces in the school for the students to develop interaction and discussion to a wide involvement of the community and the administrative staff in the construction of a wider experience of gender budgeting in the well being approach in Vicenza a municipality located in the Veneto Region.

Different experiences will be here discussed together with sugestions on innovative ways to experiment WBGB including the development of participatory well being gender budgets experiences.

First of all it has to be said that Public Budgets done in a gender/feminist perspective and in a well-being approach (WBGB) are radical and complex. Their radical nature is inherent in the perspective that shifts the focal point of political action, theory and policy, from the allocation of monetary and real resources (means) to a direct focus on the quality of lives (ends) of flesh-and-blood women and men, embedded in: place, time and social contexts. To sustain our perspective we stand on women’s intellectual and political authority. In fact, in the last decades,
feminist action and knowledge, have opened, at international level, a new epistemological ground, introducing innovative analytical frameworks, concepts, languages to express the complexity of human bodies, minds, emotions and social relationships which push all social sciences to their limits disclosing their reductionism and disciplinary segmentation.

To cope with the WBGB complexity we rely on the common-sense experiential knowledge of women and men’s lives and on Sen’s and Nussbaum capabilities approach that provides us a well established approach to well-being, defined as a complex multidimensional space that includes effective physical, cognitive and relational functionings, freely composed within a potential capability space. The specific gender perspective and the capability approach are closely connected as, on the one hand, women’s experience provides a deeper insight on real lives and, on the other hand, the multidimensional approach connects different living dimensions into an integrated dynamic composite that sets the space for gender equality. A composite that is not reducible into a list of fragmented inequalities as it is the final result of their interactions. This composition effect of different capabilities and functionings is very important for the assessment of the policy impact on women and men, in their life cycle.

Thus, WBGB are people centred budgets that, endorsing women’s material, ethical, cultural and economic experience, introduce an integrating more radical perspective that goes beyond the usual segmented mainstreaming of gender equal opportunity policy and makes hidden interdependencies visible, disclosing: unpaid activities, structural macro connections, policy priorities, social gender relations that although usually overlooked in the macroeconomics of public budgets are crucial for the social sustainability of the very economic system of production, distribution and exchange of wealth shaping the budgets.

In a ten-years long practice, WBGB developed several tools that we intend to scrutinize with regard to impact and viability.

At present, public budgets are examined in terms of a strictly financial technical accounting while WBGB aim at disclosing the inter-relations between public finance and the well-being of women and men, whose lives and relationships become the main key for analysing public policy and assessing their impact. To do so we need both a radical perspective and a sound theoretical approach to confront the present policy of taking the instrumental budget-equilibrium as the priority objective that prevails over other fundamental ones such as: full employment, social sustainability
and equity. As a matter of fact in the last decades a mere administrative tool has become the top priority policy objective and even, in Italy, a constitutional principle. As it was known in the debate on fiscal policy in the 70s (Galimberti, 1970) in presence of different policy objectives we need different budgets able to trace the causal processes and the interdependences that lead to the totals of expenditures and revenues. We need in fact to have economic theory and real facts and not only financial accounts. Moreover, monetary figures have to be made understandable in terms of objectives and results, transparent with regard to procedures and responsive to distribution and social equity. This requires, first of all, to clear concepts, connections and plausible causal relations both at micro and macro level. To do so we need to have a more realistic and not neutral definition of the individual expanded to include capabilities, and a macro approach extended to include also unpaid domestic and care work and the process of social reproduction of flesh-and-blood women and men among the structural processes of production of commodities, distribution of incomes and market exchange.

There are at present many attempts to make people centred budgets. They are usually placed under UNDP initiatives open to gender and poverty or International Civil Society human rights based actions for greater transparency (IBP, 2013). Our budgets are more modest with regard to scope and local with regard to context, but perhaps more radical in the effort to use gender to change the analytical perspective and more explicit about the theoretical approach to be used to define living conditions.

The WBGB done in Italy have moved only at the level of Local governments and other public administrations such as Universities and Schools. In doing them we adopted a very pragmatic logic, basically we did what we could, given the specific characteristics of the public administrations asking for our expertise and their political motivation to undertake a gender budget project.

This moving at local and small level is not only a prudent, defensive choice but is also responding to the fact that at these levels public administrations are nearer to effective living conditions, human vulnerability and life complexity, and are more and more forced to assume direct responsibility on this ground as at present the financial resources going to Local Governments and welfare institutions, such as hospitals and schools, are cut while social needs are growing.

In the years we have been developing some tools that have proved to be useful. These tools regard the communication of the perspective, the indication of specific
lists of capabilities and functionings, drawn on the basis of internal discussion with the administrators, the design of a context analysis adequate to capture the living dimensions of complex individuals seen in their life cycles, differences, inequalities, and network of responsible relationships, etc. Actually, also with regard to context analysis we do what we can, given the available data and the administration capacity and willingness of providing useful information. However, during our experiences, the need of new data disaggregated by gender and on relevant dimensions of well being in a gender perspective occurred with a clear quest to National and local statistical offices that in some instances has found a reply. Once the context has been analysed possibly drawing well-being gender indicators, we prepare matrices that can show the shift of focus from the administrative machinery to residents’ well-being, defined by the list that has been discussed and agreed on the basis of a reasoning process that takes into account local history, place, social structure and institutional functions and policy objectives or has arisen from a participatory process. This phase is more descriptive than normative as it is a first step undertaken to open an institutional space for institutional self-reflection on the relationships between the administration and those who live in the territory and to practice a direct attention to real lives taking into explicit account material and moral conditions, social relations, life cycles, countries of origin, etc. The matrix allows to detect shared responsibilities on well-being dimensions (mobility, education, access resources, caring, etc.) or towards some specific sections of the resident population. In this exercise of translating the administrative usual language into a capabilities and functionings framework, the development of a new language is crucial for the sake of clarity and efficacy. In this linguistic effort common experiential knowledge is very useful as, at the of the day, we are all flesh-and-blood individuals experiencing vulnerability and complexity. Clarity of the matrix and language can be greatly improved by residents participation as they know their life and can contribute to an exercise of public reasoning on “how do we want to live?” Finally the matrix can be used to classify policy objectives and money according to different well-being dimensions. This is the most difficult step that requires the cooperation of the finance department experts that know where to find programs, objectives and the money allocated. To conclude, as we shall see in the following sections there is a lot of work still to be done. Nevertheless we found that the complexity of WBGB is balanced by the
higher degree of realism, by the methodological connections between ethics and provision, accountability and results, aims and objectives, responsibilities and actions, a reflection on real lives that becomes the real key of efficiency, transparency and accountability.

**Reflections from selected experiences**

In analysing the WBGB experiences we have selected those that appear to us more significant as regards to different dimensions.

The application of the well being gender budget approach to *Istituto Cattaneo Deledda*, a high school in Modena (Italy) where the experience has been carried out by Francesca Corrado in 2009 within the school project 'Democracy & Participation', had an impact on different dimensions. This is also the first experience of a participatory well being gender budget applied to a school. It involved 39 students (30 women and 9 men) attending the last year in the Commercial & Technical area of this school. The project lasted 6 months and was conducted by Corrado within the school & with workshops organized in the Department of Economics of the University of Modena & Reggio Emilia (Corrado, 2010).

The students have been actively involved in the classes in order to acquire knowledge on gender budgeting, the capability approach and well being gender budgets. After a written assessment on the degree of knowledge acquired on human development and gender budgeting, the students have been working both individually and in small groups in order to realize the different phases of the project that can be summarized as following:
- reflect upon individual capabilities and the impact of the school on their development
- develop a list of relevant capabilities that the school can affect
- produce a context analysis to highlight the degree of development in each relevant well being dimension
- well being gender budgeting of the School Budget (WBGSB)

The students defined the multidimensional space of wellbeing. According to them the relevant dimensions of their well being were:
- Having access to knowledge (Education, Training and Information)
- Having access to research (to develop a deeper knowledge on topics selected by the students)
- Respecting others (students, school staff, teachers) & the environment
- Working and having access to resources
- Living a healthy (mental, emotional, physical) life
- Studying in safe and suitable places and in an eco-compatible environment
- Enjoying culture & beauty
- Travelling (for recreational and cultural activities)
- Participating in social and school life
- Living in an equitable society
- Caring for oneself and for others (devoting time for recreational, cultural and sport activities and taking care of others)

The capabilities list was used both to conduct the context analysis and to audit the expenditures of the School in terms of each dimension of well being.

The context analysis has been conducted by using administrative sources and the results of a questionnaire that has been submitted to all the students in the two classes. Each project in the School budget has been analysed in its impact to the capabilities identified by the students as relevant in the list.

Amongst the main results of this experimental project we can consider:

- during the process the students developed interaction with other students. This positively contributed to their capability of knowing and respecting others and enhanced team working and actually contributed to a behavioural change.
- during the process the students were also invited to reflect on essential and personal aspects of their lives. Four students even changed their plan on education/work activities and decided to invest in further education (a choice that is not very familiar in this type of high school), one of them decided to enroll to the Law Faculty to be able to defend Indian women's rights. This can be considered as an effect on the values formation in line with education aims as discussed more in length in Vaughan & Walker (2012)
- the elaboration of a participated list of capabilities considered relevant by the students and with regards to which the High School was considered as a key actor, highlighting also the link with other institutions able to have an impact on their well-
being,¹
- critical assessment of the available data to reconstruct the context and tool of analysis to collect more data on the capabilities and their developments;
- critical assessment of the School Budget and projects with regard to each capability in the participated list. The students were very critical in particular on the development of the capability of accessing knowledge (with regards to access to information) and on the capabilities of enjoying beauty and culture, studying in a safe and suitable places and in an eco-compatible environment. With regards to the latter the High School reacted by improving the conditions of the school garden and by introducing a cafeteria, some of the points that the students had stressed as critical in their context analysis. The latter being a concrete and tangible result of the experience.

This experience created a space for a public discussion on the definition of well being and on the effect that the school can have on each dimension of well being in the interaction with the family and the other institutions.

MODENA MUNICIPALITY

The Municipality of Modena has been involved in the process of gender budgeting in more than one experience. At the very beginning of its implementation (Addabbo, Lanzi, Picchio, 2010; Addabbo, Saltini, 2009). The pioneering first experience allowed to formalize the interaction of more than one department in the municipality on different dimensions of well being and opened a space for discussion within the administration on the aims of gender budgeting and on the contribution of each project/expenditures to the different capabilities that could be envisaged in the municipality activities.

It allowed a thorough reflection on the interaction of different departments and different actors in the context of the town with regards to the capability of caring for others, with a special focus on children aged from 0 to 3. The latter implementation of the approach gave the opportunity to the local government to reflect upon contrasting outcomes of different department on the same capability. For instance the design of a one year parental voucher from the Social Policies Department that

¹ This is in line with a development of analysis at school level to derive situated capabilities that can be found also in other studies as in Spreafico (2012).
established a one year leave for low income parents who would have left employment to devote himself to child care and a one year leave of the child from public child-care services did show how it was in contrast with the aims of improving parents share of childcare (since mothers were more likely to take the leave and had not to return to paid employment afterwards) while the same capability was developed by the Education Department supply of child care services that fostered the sharing of child care within the couple (involving both parents in the education process of the child and devising courses addressed to fathers) and provided directly child care support to the family.

The second experience involved different sectors of the administration in the analysis of the relevant dimensions of well being and in devising a new methodotology able to evaluate each project in a well being and gender perspectives leading to gender auditing of the Budget with regards to the capability of feeling safe and secure and the local government role in fostering work life balance.

Tangible results have been achieved in terms of the language of the administration, the continuous meetings enabled to share the methodology to the point that the new administration refers to the dimensions of well being detected during the WBG experience in the public debate on its policies and aims. But also lead to the need of including in the management audit quantitative indicators specific to evaluate the progression on well being in a gender perspective.

The results of the experience gave the government outcomes in terms of evaluation of projects with regards to the dimensions chosen and suggestions on how to collect the data in order to provide a continuous evaluation of the policies.

**VICENZA MUNICIPALITY**

After having considered the experience of a town (Modena) that was the first experience of the WBGB, we have included in this reflections a late comer: the municipality of Vicenza, located Veneto in the North East of Italy. The municipality has started a process of well being gender budgeting in Spring 2014 responding to the obligation of producing yearly gender budgets opened by an intense programme of training activities. The training programme included 20 officials working in areas most directly involved in the delivery of services to citizens and those ones
responsible of supporting the economic, financial, and statistical part of data retrieval and of communication.

The municipality asked for a mixed form of training with both theoretical and practical lectures. This mixed type of training enabled the participants to be fully involved in the project, in an atmosphere of sharing and collaboration. At the end of the training course the working group produced two reports: 1) a feasibility study of gender budgeting in a well being approach and 2) a report based on BES (the Italian economic and well being statistical system) providing indicators of the quality of life in Vicenza and an analysis of the local context in a gender perspective designed according to a capabilities approach.

The approach adopted has allowed to practice an interdepartmental, inter-sectoral cooperation made possible by the multi-dimensional perspective that contributed to highlight not only weak points, but also new or at least unfamiliar aspects of municipal policies.

The training course made it possible to put in contact officials belonging to different departments who usually have few opportunities to interact and grasp different aspects of their work that can useful for fulfilling their own duties.

This experience made the officials aware of the importance of collecting data disaggregated by gender for each well being dimension indicated in the well-being space and made the relevance of the work done by the statistical office quite evident and showed that its active involvement in the project would be essential in terms of advice, information and support in the design and implementation of research activities, inquiries, retrieval and interpretation of data.

The construction of a gender budget with an internal participatory stance has allowed to provide expertise and working tools useful to find an appropriate way of evidence based information and to learn how to read and interpret data from wider points of view.

Moreover, officials have been awakened as concerns gender issues and a greater awareness of the diversified impact of public policies has been reaches enabling to read budgets in a less neutral perspective.

Last but not least, the training course has allowed to acquire a common language among participants operating in different areas and having different technical and professional skills as well as different degrees of awareness of the equality issues. After a first course, a second one has been planned in Fall 2014 with the aim to
further extend the training programme to all the different departments including
them in an internal participated drafting of the gender budget.

**Points for discussion and further developments**

Well being gender budgets have progressed in a decade of local government
experiences both in terms of methodologies and awareness.
The experiences that we have presented in this draft paper concentrate on some
relevant points that we wish to address here for an open discussion:
- the relevance of including a thorough reflection on the specific dimensions of well
  being within the institution concern, to be analysed in a process that includes training
  on the new perspective and approach. Training activities should involve members of
different departments and focus both on the methodology and on its application.
  This need is certainly shared by other gender budgeting methodologies but in the
  case of well being gender budgets it is vital both for its radical change of focus and
  for the complexity inherent in a multidimensional approach to the quality of lives
  that sets the space for assessing the policy impact on gender equality.
- the need of including a participatory process to reason on the well being
dimensions and their impact on gender inequality. A public reasoning on “How
  should we live?” that requires the active involvement of the community and women
  associations in particular. This focused and more inclusive participation has been
  experimented in some cases showing that it could effectively constitute a substantial
  step forward in terms of outcomes and citizens transformative interaction with the
  local government. Further advancement along this line are currently developed
  experimenting innovative tools in participatory methodologies. Moreover, the
  institutions involved in gender budgeting should monitor to what extent each
  participatory process already enacted are really conducted in an inclusive way. Our
  experiences at local level show that in many cases when at local level a process of
  change was carried out in the participatory phase relevant actors were simply not
  involved (this for instance happened in the redevelopment of a vast area in the
  Modena territory whereby the participatory process was conducted excluding
  migrant women)
- the need to involve statistical offices and to invest in data analyses to provide a
  richer set of indicators than the one currently available.
- include quantitative targeting in terms of well being dimensions and gender equity
  in management auditing and their monitoring
References


