



United Nations Entity for Gender Equality
and the Empowerment of Women

Integrating a Gender Lens into a Community-Based Poverty Monitoring System: Insights from Villa El Salvador, Peru

Recognizing the need for understanding how the experience of poverty is gendered, the UN Women in collaboration with the International Development Research Centre (IDRC) integrated a gender-responsive budgeting (GRB) approach into the Community Based Poverty Monitoring System (CBMS). GRB is a tool that provides a way of assessing whether government revenue and expenditure is meeting the needs of different groups of women and men,



Photograph by Renzo Tello

girls and boys. GRB initiatives are an important strategy for supporting the implementation of policy commitments towards gender equality. The Community Based Poverty Monitoring System¹ (CBMS) is a local level data collection tool that was developed in the early 1990s to provide policymakers and program implementers with a good information base for monitoring poverty and tracking the impacts of macroeconomic policies and reforms.

The CBMS is an organized way of collecting information at the local level for use by local government units, national government agencies, non-government organizations, civil society and development partner agencies for planning, program implementation and monitoring.² CBMS was

developed in response to the need for a regular source of up-to-date information at the local level to inform development planning and monitoring. The CBMS provides regular, reliable and relevant data on the socio-economic status of individuals and households in a particular locality in a form that can be easily understood by local governments, decision-makers and other actors.

The relevance of CBMS is emphasized with growing trends toward decentralization which have prompted the need for local level data to inform local level planning and budgeting. Adding a gender lens to the standard CBMS has helped to fill a need for a poverty-monitoring system that is gender-sensitive and adapted to local contexts and capacities, conducted by local researchers, and intended for local-level planners.³

¹ The CBMS was developed by Celia Reyes and the Micro Impacts of Macroeconomic Adjustment Policies (MIMAP) team with support from IDRC.

² http://www.pep-net.org/NEW-PEP/Group/CBMS/cbms_about.htm. Accessed 7 January 2009.

³ Reyes, C. and E. Due. (2009). *In Focus: Fighting Poverty with Facts Community-Based Monitoring Systems*. International Development Research Centre.

Peru Pilot: Linking GRB and CBMS

Through joint efforts between IDRC and UN Women, a number of pilots have been supported to integrate a gender lens into the CBMS in the Philippines and Senegal. The most recent piloting is taking place in Villa El Salvador – a poor district in southern Lima in Peru. The pilot is being implemented in Metropolitan Park an area located within Villa El Salvador.

The context in Peru was opportune for implementing the CBMS-GRB pilot due in part to the passage of a national law in 2005 to promote participatory budgets at the provincial and municipal levels. The passage of the law has provided an opportunity for ordinary citizens to participate and influence the allocation of a proportion of the capital expenditure budget (investment budget). In September 2007, an amendment to the Budget Law of Peru mandated that resources be allocated in a gender equitable way. The passage of such a law has provided citizens, in particular women, space for engagement with their local governments so that they can understand and contribute to shaping local level planning and budgeting processes.

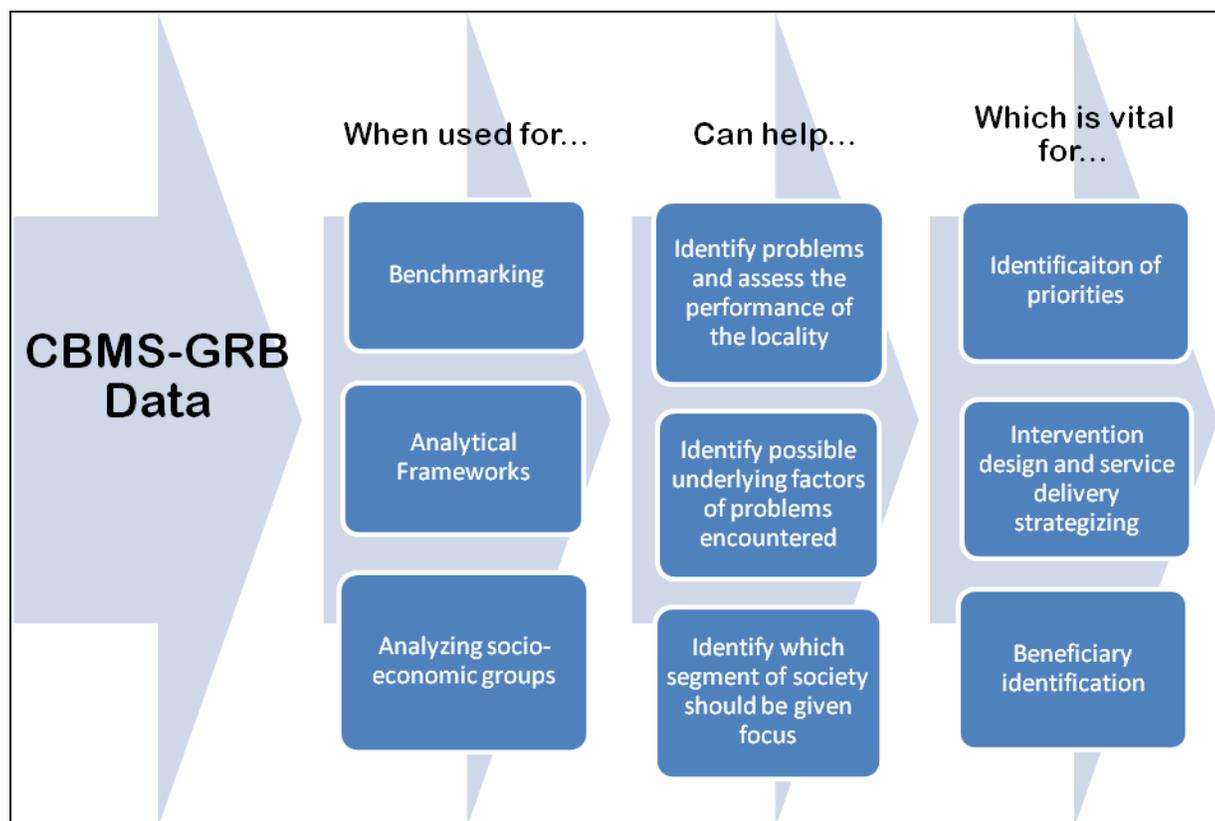
Linking GRB with the CBMS can help expand the use of CBMS in gender-responsive planning, budgeting and monitoring of public policies. As a main provider of services and resources, local governments can use the CBMS-GRB data to assess needs accurately and ensure that resources are allocated in a way that redress biases and eradicates poverty and gender inequality. In designing and implementing the CBMS-GRB methodology local authorities and communities work together and are guided by empirical data and evidence-based analysis and this is important for ensuring effective public spending and greater public accountability.

The Urban Program of Centro de Estudios y Promoción del Desarrollo (DESCO), an NGO that promotes social development and capacity-building of local governments and disadvantaged socio-economic groups, is implementing the pilot. The pilot not only aims to provide data but also seeks to empower women to influence decision-making in local level planning and budgeting. The Urban Program has influenced many local governance processes, and provides capacity building and technical assistance to local government authorities and citizens in designing, implementing, monitoring and evaluating participatory budgeting processes in southern Lima.

The Municipal Agency in Villa El Salvador, which is the principle body that manages the local district in Villa El Salvador, is playing an integral role in facilitating dialogue between the local population and the municipality, and such efforts have helped to create a supportive institutional and political environment at the local community level to implement the CBMS-GRB pilot. A key goal of the partnership between DESCO and the Villa El Salvador municipality is to improve women's opportunities and capacities for engaging in participatory budgeting processes to influence local level decision-making on resource allocations and service delivery.

The CBMS-GRB is meant to be a light, inexpensive instrument which is relatively easy to administer and which can be analyzed within a short period to provide useful indicators. The CBMS-GRB tool helps to measure deprivations in the different dimensions of poverty including gaps in education, health, nutrition, and poverty to aid the design of local development plans. The 'standard' CBMS has a carefully designed and relatively simple set of indicators on health, nutrition, shelter, water and sanitation, education and literacy, income, employment, and peace and order. DESCO used these core indicators in designing the census questionnaire and also added indicators on demography, environment and migration. Figure 1 below illustrates how CBMS-GRB data can help in the design of gender-responsive plans and programs.

Figure 1. The Uses of the CBMS-GRB Data



Methodology

The pilot data has really highlighted how the data generated from the national survey is very different from data generated through a local survey, and how much more specific the local level information is - Representative from Ministry of Women and Social Development (MIMDES)⁴

To integrate a gender perspective into the CBMS design the DESCO technical team held focus groups discussions and consultations with UN Women, the local government, representatives from the Planning and Budgeting office, the Women’s Program, and other stakeholders to discuss the selection of indicators for the survey that would capture gender disparities.

The research team analyzed each of the indicators and considered whether information on the respective indicators could be collected at the local level. For example, the survey includes sex-disaggregated indicators on education and captures information on girls’ and boys’ access to education. The survey has questions on the level of education acquired by the household members, including children and captures information on whether teenagers are missing classes. The survey also gathers information on the type of health insurance household members have, if any. Peru has private and public health insurance systems and a free government health service for the poor. Nonetheless, patients can still face problems in getting the needed medications in a timely manner and many cannot purchase medications due to the costs.

The goal of the pilot is to collect sex-disaggregated information to understand what is happening to women and men and girls and boys in terms of their experience of poverty and access to services. To the extent possible, the research

⁴ Representative from MIMDES. CBMS-GRB Technical Workshop, Lima Peru. 13 August 2010.

team adopted the standard concepts and definitions used by the national statistical office in Peru. For example for the indicator “access to safe water,” DESCO employed the official definition used by the national statistics office to allow for comparability of results. DESCO designed the survey and conducted a pre-test of the questionnaire to determine whether the survey contains questions and indicators that allow for an understanding of gender gaps at the local level.

DESCO launched a publicity campaign in Metropolitan Park to encourage citizen participation in the survey and to ensure citizens understood the importance of participating. Posters and banners were developed and circulated. Three assemblies were held with community leaders which provided an opportunity to secure support from the community leaders and provide them with information on the pilot. The Mayor of the Villa El Salvador district also provided support by issuing an ordinance to encourage citizens to participate in the census. The publicity campaign for the census was successful and the majority of citizens in Metropolitan Park participated.

The DESCO research team conducted a census in 11 urban settlements comprising the Metropolitan Park⁵ area in Villa El Salvador. A total of 1960 households were surveyed in the census. In each household, the household head (male or female) was interviewed. Census results will be available to Metropolitan Park inhabitants and municipal authorities so this information can support proposals to improve the zone’s socio-economic development in a gender-responsive way. In Villa El Salvador the unit cost per lot in the census was approximately \$10.67 USD (30.40 PEN).

Because public participation is an important aspect of the CBMS-GRB process, the census results are validated through a community forum and mainly through focus group discussions where citizens can discuss underlying factors and conditions that give rise to the results and local conditions. The data collected through the CBMS-GRB survey will enable the local government and women’s organizations in Villa El Salvador to analyze if local government projects are responding to the needs of the community. The survey will also create a baseline of the situation of the population and the needs of women in the locality so local governments can monitor whether conditions are improving or worsening.

Addressing Challenges

The CBMS-GRB pilot is helping to address some key challenges in local development planning and budgeting in the Villa El Salvador municipality such as the data gap at the local level; linking planning and budgeting; and strengthening the capacity of the local government for gender-responsive planning and budgeting.

Local level data

In Villa El Salvador, there is a lack of empirical local data to track whether the programs and activities outlined in the Local Development Plan (LDP) are actually implemented. Timely data is necessary to inform the design of local level planning interventions. Moreover, measuring and documenting gender inequality is important because what is measured is more likely to get addressed. Laura Soria, the project leader for the CBMS-GRB pilot notes that the “the pilot has a lot of potential to raise awareness and provide information on gender gaps” (personal communication, 13 January 2010). It is critical to have evidence, for example, to demonstrate who and where the poor are; and information on how the experience of poverty is differentiated for females and males can prove to be useful in beneficiary targeting.

Linking planning and budgeting processes

A critical weakness of local level planning processes in many countries is that they fail to align budget decisions with local needs. A significant challenge in the local development process in Villa El Salvador is linking the participatory planning process to inform the design of the Local Development Plans. Often priorities articulated by women in participatory budgeting forums are dropped when the Local Development Plan is finalized and budget decisions are

⁵ In the Metropolitan Area there are 4 sectors and 32 census zones.

made. The CBMS-GRB methodology provides a way to align the Local Development Plan priorities with budget formulation and track whether initiatives contribute to gender equitable local development.

Strengthening capacities of local governments

Capacity development of local governments for gender-responsive planning and budgeting is important as women are typically confronted with more obstacles than men in accessing systems of governance. The pilot project aims to provide capacity-development to local governments to monitor and analyze poverty in a gender-responsive way through the CBMS-GRB and to ultimately sustain local capacity for monitoring of public spending and to establish local ownership of information and knowledge.

Preliminary Findings

The pilot survey included 1960 households in Metropolitan Park, and generated some important findings:

- The data reveals that households headed by women (35.7%) are most affected by hunger and malnutrition.
- Half of the population in Metropolitan Park does not have access to healthcare.
- Ninety-seven percent of the population obtains water from water lorries - the majority of which are contaminated.
- In terms of employment, 51% of the survey respondents indicated that they are self-employed of which about one-third are women. The unemployment rate is higher amongst women as compared to men and women's labor conditions were found to be worse in comparison to men. Twenty percent of the population lives in unsafe housing.
- Access to education is similar for women and men - 12% of the inhabitants do not know how to read or write, which is a higher incidence than the average in Lima.
- There were no differences found between men and women in terms of access to property - approximately 81% of households possess a property title.

UN Women in Peru is using data from the pilot to inform its broader gender responsive budgeting work in Peru and also the work of civil society organizations in Metropolitan Park. In 2011, the Program for Women and Equal Opportunities of the Municipality of Villa El Salvador will be able to use the pilot census data to engage in more evidence-based advocacy and awareness-raising for women's priorities and needs. UN Women in Peru is exploring collaborating with local health workers who go from door to door to ensure that families with small children are receiving proper healthcare. The survey census data will enable the local health workers to target households more effectively as the data provides information on which households are not receiving adequate healthcare.

The municipal government of Villa El Salvador has supported the implementation of the pilot and the political will has helped to facilitate smooth and effective implementation. For example, for the training of the surveyors and for the actual census, the municipality provided the Max Uhle High School facilities to the research team and field staff.

Participatory Budgeting

In Peru there is political space to demand good local governance as the data being generated from the pilot can provide a strong evidence-base for identifying the needs of disadvantaged socio-economic groups to feed into local development plans and budgets. In principle, the Participatory Budgeting process in Peru is another mechanism for strengthening the link between planning and budgeting and it can provide entry points for gender-responsive budgeting at the local level.

In Villa El Salvador, Participatory Budgeting is carried out in one calendar year and informs the budget for the following year. Participatory Budgeting is the process by which citizens (represented by elected officials, civil society

organizations or ad hoc groups) deliberate and negotiate over the distribution of public resources. Participatory Budgeting is prescribed by formal regulation that entrust a given local community the right to decide how to allocate a percentage or the totality of the local budget. It is increasingly recognized as an effective mechanism to strengthen citizens' voice in decentralized systems, but also to secure good governance through more equitable public spending and greater transparency and accountability.

In the Participatory Budgeting process in Villa El Salvador, a number of workshops are held in which citizens identify development priorities. The municipality formulates project proposals based on the priorities identified through the workshops. The municipality then organizes public consultations so that citizens can choose from a project bank the project proposals they want to support for funding. In Villa El Salvador, the majority of proposals in the project bank focus on urban infrastructure. Ultimately, approval for proposals from the project bank is determined by the Ministry of Economy through a system called the National System of Public Investment (SNIP). Even if the Local Government has approved a project through public voting through the Participatory Budgeting process, the national government can question the project's viability or refuse it altogether if it does not meet the technical criteria set by the Ministry.

Currently there is no local level data collection system in Metropolitan Park that provides socio-economic information. The only existing system in place is the Sistema Integrado de Administración Financiera (SIAF) - a comprehensive administration information system which is used entirely for financial purposes and to understand local government income, liabilities and assets. At a technical workshop, held in August 2010, Antonio Paredes, the Head of the Planning office in Villa El Salvador mentioned that it is critical to collect and disseminate information on poverty and local conditions so citizens can make evidence-based choices in selecting projects for funding during the Participatory Budgeting process.

Advancing women's rights at the local level

The municipality has created a program for women on equal opportunities which emerged through the advocacy efforts of women's organizations and citizens who wanted the municipality to do more to promote gender equality. The 'Women's Program' was created in the district to promote women's participation in political, social and economic activities and awareness-raising of women's rights. The Women's Program is responsible for promoting the implementation, monitoring and evaluation of the recently approved Equal Opportunities Plan (EOP) of Villa El Salvador. The Women's Program proposes ways to mainstream gender at different levels in the municipality and ensures that private and public institutions address gender issues in their



Photograph by Renzo Tello

activities and programmes. In addition, the Women's Program is providing technical support on incorporating gender-sensitive indicators into projects developed by the municipality. Workshops are held for civil servants on how to include gender-sensitive indicators in the formulation and design of projects that address diverse issues such as sexual and reproductive health and the environment.

Gender-responsive local planning and budgeting

There are many challenges that confront local planners and governments in ensuring efforts to measure, describe, and analyze poverty and other development problems at the local level integrate gender and socio-economic analysis. One way in which gender advocates and women's organizations are holding governments accountable to their commitments and policies is by linking them to the distribution, use and generation of public resources. Reducing gender inequality in local planning and budgeting means involving women at the design, planning, implementation and monitoring phases of local development programs to analyze the differential effects of such programs on women and men and boys and girls.

Through its efforts in promoting equitable local governance, DESCO and UN Women in Peru have forged and built upon strong and dynamic relationships with both the local government, women's organizations and ordinary citizens working on gender equality issues and successfully involved such groups in meaningful dialogue on local level planning and budgeting processes. The aim is to use the data generated from the CBMS-GRB pilot to inform the formulation of the gender-sensitive annual development and investment plans. If used routinely in Villa El Salvador, the CMBS-GRB tool can help to monitor where and who the poor are and whether they are benefiting from local government programs and policies. The hope is that the information will provide a robust and empirical evidence-base to advocate for gender-responsive policies and also help institutionalize a more sustainable gender-responsive community-based poverty monitoring system at the local level within government.

UN Women is the United Nations Entity for Gender Equality and the Empowerment of Women. The main roles of UN Women are to support inter-governmental bodies, such as the Commission on the Status of Women, in their formulation of policies, global standards and norms; to help Member States to implement these standards, standing ready to provide suitable technical and financial support to those countries that request it, and to forge effective partnerships with civil society; and to hold the UN system accountable for its own commitments on gender equality, including regular monitoring of system-wide progress.

www.gender-budgets.org

The **Poverty and Economic Policy (PEP) Research Network** is a global network of developing country researchers with the skills and reputation to participate in and influence national and international academic and policy debates on poverty issues. The Community-Based Monitoring System (CBMS) International Network aims to design and pilot community-based systems for monitoring poverty in its multidimensional sense.

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For more information please contact:

Karen Suarez
National Program Coordinator
UN Women Peru office
Av. Del Ejercito No 750. Magdalena del Mar Lima – Perú
Tel: (511) 625-9000 x 9086
karen.suarez@unwomen.org