

Chapter 7

Participatory Evaluation of a Public Policy Supporting Transport

A Perspective of Inclusion and Transformation – Jalisco (Mexico)

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Abstract

This chapter describes and examines the authors' experience in implementing a participatory evaluation of the "Mi Pasaje" Transport Support Programme in Jalisco, Mexico, as an inclusive strategy for improving public policies. Under the coordination of Evalúa Jalisco, the principles of participatory evaluation, action research and popular education were adopted in order to actively involve the participating stakeholders in the implementation of this public intervention. The methodology comprised workshops, talks and instructional and methodological resources across its four stages. The results show an improvement in ownership of the policy and in the quality of services, by reducing waiting times and optimising resources. It is concluded that this participatory approach fosters an evaluation culture that strengthens public trust and citizen commitment to public policies.

Keywords

Participatory Evaluation, Public Policies, Inclusion, Citizen Participation, Key Stakeholders, Social Programmes Or Interventions, Mi Pasaje, Evalúa Jalisco, Social Development.

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Introduction

This text is coauthored by those of us who have acted as coordinators and facilitators of the inclusion of diverse stakeholders, through participatory mechanisms, in the evaluation of various public policies and interventions under the responsibility of the subnational government of Jalisco, one of Mexico's 32 federal entities. These activities have been carried out across more than five public interventions between 2019 and 2023, from the Central Evaluation Unit, known as Evalúa Jalisco, within the Secretariat of Planning and Citizen Participation, under the approach of a systemic perspective and the principles of popular education and participatory action research.

Here we address the first of five experiences of evaluation with participatory mechanisms, which involved including in decision-making the community users of the programmes, managers, members of the citizen councils of the subnational state, independent evaluators, and methodological facilitators who, in the various phases of the evaluation, become involved in defining the scope and type of evaluation, in conducting the evaluative research, in analysing and validating the findings and recommendations, and in monitoring the improvement agenda.

The participatory evaluation of the Mi Pasaje Programme—in what appears to be the first exercise of this inclusive evaluation practice in Mexico—began in 2019 with the expectation of concluding in

2020. However, owing to the outbreak of the Covid19 pandemic, it was completed in the last quarter of 2021. This evaluation formed part of an international cooperation project of the German Institute for Development Evaluation (DEval), through the Project for Strengthening Evaluation Capacities in Latin America (FOCELAC), which involved the parallel implementation of the participatory evaluation in Jalisco, Mexico, as well as that of a national programme in Costa Rica, led by that country's Ministry of National Planning and Economic Policy (MIDEPLAN).

This empirical article will address the following questions:

- Why incorporate inclusive and participatory mechanisms into evaluations managed by a government body?
- What is evaluating with participation, and what is its purpose?
- What did the Evaluation with Participation of the Mi Pasaje Programme consist of, and what was done during it?
- What are the identified effects of the participatory evaluation?
- What reflections, lessons and challenges remain from the experience?

In the first section we present the national context in which the intervention took place. In the second section we explain what government-managed evaluations are and what purpose they serve, illustrating the subnational strategy of Evalúa Jalisco and the debate

between concept, method and scope. The third section then turns fully to presenting and discussing the participatory evaluation of the Mi Pasaje Transport Support Programme, carried out in Jalisco, situating it within the context of an evaluation with participatory mechanisms in the public sector and presenting its phases. The fourth section sets out the effects identified from the evaluation of the Mi Pasaje Programme. Finally, the fifth section closes the chapter with a general reflection on the lessons and challenges we have encountered through the experience of Evalúa Jalisco.

The Mexican national context

In Mexico, evaluation policy is institutionalised; it is one of the countries in Latin America with a robust national evaluation system. At the federal or national level, evaluation policy is led by the National Council for the Evaluation of Social Development Policy (CONEVAL). The system is complemented by the work of the Ministry of Finance and Public Credit (SHCP), which makes up the National Performance Evaluation System, extending evaluation to the budgetary programmes of the budgetary system. Likewise, the fiscal authority, through the Federal Superior Audit Office, plays a role by making evaluation mandatory for budget programmes funded by fiscal resources transferred to the federal entities.

According to the *National Evaluation Capacities Index (INCE)*²⁹, Mexico scored 6.11 out of 10 in 2022. By way of comparison, Costa Rica obtained a score of 6.18 the same year. For 2023, Peru scored 4.51; Argentina: 5.97; Colombia: 5.45; Ecuador: 3.54; Guatemala: 3.1; Paraguay: 3.61; the Dominican Republic: 3.36; and Uruguay: 4.23 points.

Of the five dimensions assessed by the INCE, Mexico scored 6.9 for *Institutional structure* (tied with Costa Rica), 7.7 for *Quality of evaluations* and 6.5 for *Use* (these two being the highest scores registered). However, for *Multistakeholder* spaces, which identifies spaces for coordination and the participation of relevant stakeholders, it scored only 3.8, compared with Costa Rica's 6.1. As for *Evaluation offer*, which assessed evaluation networks, training programmes and the existence of professionals and organisations, it obtained 5.7 points, whereas Costa Rica registered 6.3 for the same year, with the availability of training programmes being a particular highlight.

Since 2011, CONEVAL has carried out a biennial *Diagnostic Assessment of the Progress of Monitoring and Evaluation* in the federal entities. Jalisco has ranked first from 2015 up to the most recent measurement in 2023³⁰.

²⁹ For further details on the INCE and the assessment of Mexico, see <https://inceval.org/es/country-page/mexico>.

³⁰ For further details on the Diagnostic Assessment of the Progress of Monitoring and Evaluation in the Federal Entities, see https://www.coneval.org.mx/coordinacion/entidades/Paginas/Indice_diagnosticos_temp.aspx.

As a federal country, Mexico has 32 federal entities or subnational states. In 2016, the federal entities formed a Monitoring and Evaluation Network (RedMyE) which is made up on a voluntary basis of the State Evaluation Units and aims to create a peer-learning space for sharing experiences, challenges and knowledge among the federal entities regarding the development and institutionalisation of monitoring and evaluation systems.

Founded in the city of Guadalajara, the capital of Jalisco, the RedMyE meets twice a year and, in 2024, was made up of 28 of the 32 federal entities. Each state has a diverse range of institutional structures, but given the mandatory requirement to evaluate programmes funded by federal resources, virtually all of the entities evaluate them; they differ in the extent to which they evaluate programmes financed with their own resources, as in the case of the Mi Pasaje Programme.

With regard to participatory evaluations, the northern state of Chihuahua announced in 2024 the start of a process within its Annual Evaluation Programme; in 2023, officials from that state's Central Evaluation Unit took part in the Diploma Course in Participatory Evaluation from within Government³¹ coordinated by Evalúa Jalisco. This course consists of five modules taught by specialists in the evaluation of public policies, programmes and services; it is delivered in a hybrid format, with 67 hours of teacher-led instruction

³¹ For further information, see <https://evalua.jalisco.gob.mx/evaluacion-participativa>.

and 93 hours of asynchronous work, as well as 43 hours of in-person work in workshop mode. The aim of the diploma course is for all participants to learn about and develop capacities and projects to manage, promote and facilitate participatory and inclusive mechanisms in the evaluation of programmes, services and public policies, within a systemic and collaborative approach to government management; it seeks to ensure that the practice of participatory evaluation is disseminated, understood and practised as widely as possible.

Inclusion and participation in government-managed evaluations: what it is and what it is for

The Evalúa Jalisco subnational strategy

The Secretariat of Planning and Citizen Participation (SPPC) was created in 2019 under the 2018–2024 Administration, with the purpose of implementing and promoting the principle of inclusion of citizen participation in various processes and practices of public management, as well as institutionalising mechanisms of participation. For its part, the practice and technical structure of the Evalúa Jalisco strategy began years earlier with the creation of the Evalúa

Jalisco Trust³², and its operation has been led by what is now the Directorate-General of Participatory Planning and Evaluation, a technical team that since 2013 has been responsible for compiling the subnational government's Annual Evaluation Programme.

Thus, through the Evalúa Jalisco Trust, the SPCC constitutes the Unit for the Evaluation of Public Programmes and Policies. In 2018, within the framework of the congress of the Latin American Centre for Development Administration (CLAD) held in the city of Guadalajara, a relationship of exchange and collaboration began between Evalúa Jalisco and the Focelac project run by DEval and Mideplan. This gave rise to a large learning and cooperation network, formalised through the signing of a collaboration agreement and the 2019 pilot of the first exercise of Evaluation with Participation in Mexico.

As part of the State's evaluation unit, we are convinced that participatory evaluations, in addition to entailing a collaborative methodology with innovation in participatory/inclusive mechanisms, constitute a perspective that entails a different understanding of evaluation practice—one that transforms the decision-making of those involved—. This new perspective involves addressing the democratic construction of consensus, promoting equity and the inclusion of marginalised groups in evaluation practice by creating multi-stakeholder spaces, as well as recognising the complexity of development. Community transformation and the improvement of

public policies or interventions require the recognition and active, equal involvement of all stakeholders.

The debate between concept, method and scope

Recognising that this is a concept under review, with ongoing processes of reflection, analysis and practice, the term *Evaluation with Participation (EwP)* began to be promoted in Latin America by Costa Rica's Mideplan and the Focelac project around 2018, with Evalúa Jalisco joining in 2019. The term “with participation” sought to characterise those evaluations that involve participatory mechanisms in processes managed and commissioned by government bodies and that retain the research phase with external evaluators.

Although much of the EwP exercise in Jalisco was inspired by Costa Rica's prior experience and by the 2019 pilot practice, Evalúa Jalisco made its own adaptations, refinements and developments in the incorporation of participatory mechanisms, and in the practice and conceptualisation of EwP. Between 2019 and 2024, for Evalúa Jalisco this entailed formalisation in legal documents and organic structures. Thus, the Evaluation Unit was incorporated into the *Organic Law of the State of Jalisco* and into the *Internal Regulations of the Secretariat of Planning and Citizen Participation*, as the Directorate-General of Participatory Planning and Evaluation. In addition, the *General Guidelines for the Monitoring and Evaluation of the Programmes of the*

32 A public trust without its own organisational structure.

*Government of Jalisco*³³ were reformed, which, among other things, included Participatory Evaluation in law as a type of evaluation.

Thus, within the Government of Jalisco, *Participatory Evaluations* are defined as systematic assessments of the design, implementation and results of policies, plans, programmes and projects in which the active and orderly involvement of stakeholders (interested experts, planners, implementers, operators and beneficiaries) in the assessment process seeks to generate evidence-based recommendations with greater potential for usefulness and use, for the improvement of public management, fostering ownership and empowerment among those involved with regard to monitoring of public policies.

³³ General Guidelines for the Monitoring and Evaluation of the Programmes of the Government of Jalisco, available as of 31 July 2024 at https://evalua.jalisco.gob.mx/wp-content/uploads/2024/05/Lineamientos_MyE2019_13-06-2019.pdf.

Public interventions, known as programmes or policies, are systemic processes in which a set of stakeholders does not act in a linear and disconnected manner but rather as a network: officials who operate from the various government areas, managing services or delivering goods; users or beneficiaries who participate; and, in some cases, they also comprise social organisations or academics who observe, analyse and influence the decisions and processes. All of them, interconnected, create routines, processes and patterns. Many government programmes face complex problems to address that involve a network of multiple stakeholders.³⁴

³⁴ Public interventions, programmes or public policies with appropriate and optimal designs recognise, in their planning, management and monitoring processes, the multistakeholder character as part of the system of actors that influence the persistence of the public problem they aim to address. However, many others, do not recognise, document or account for this.

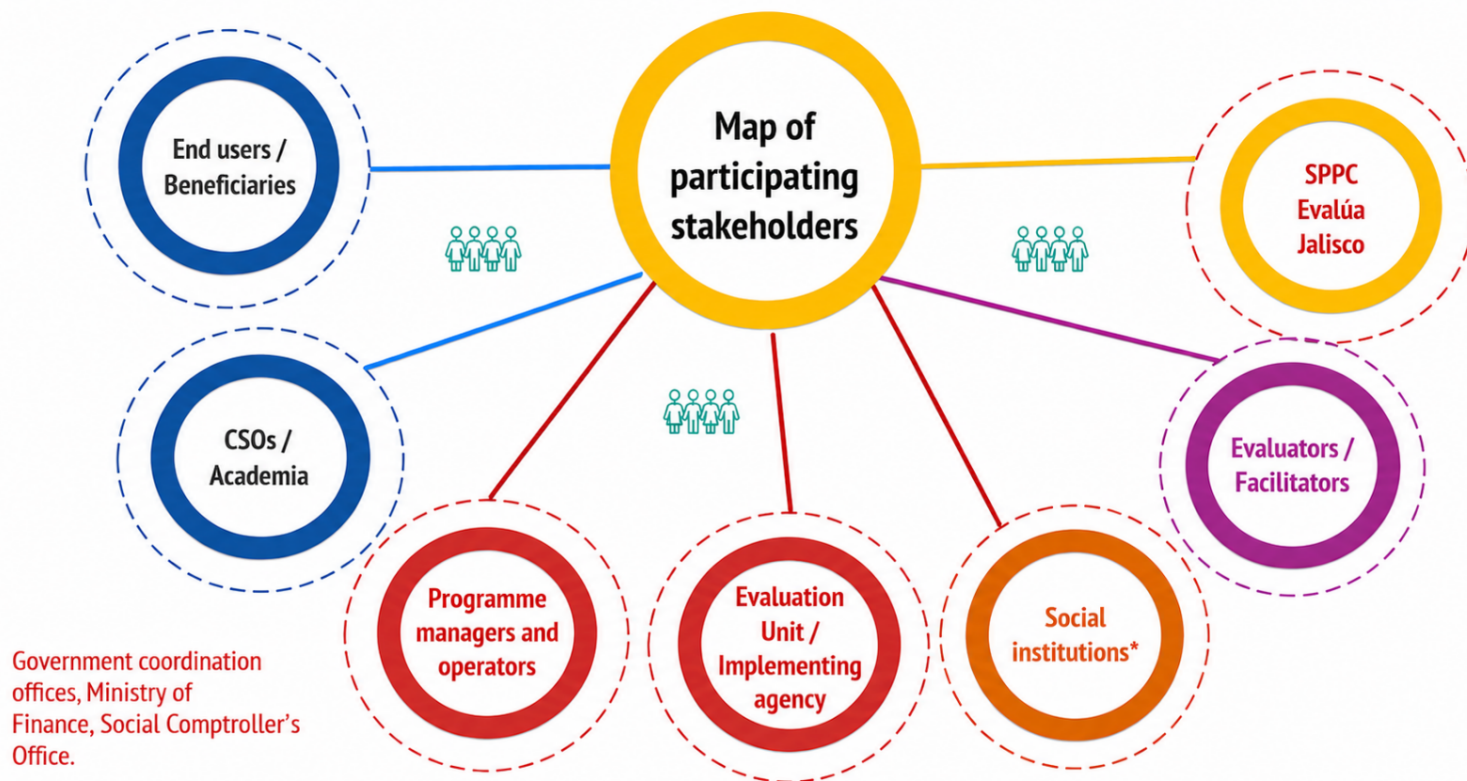


Figure 1. Map of stakeholders in Participatory Evaluation decisions. Source: own elaboration

Likewise, Evalúa Jalisco defined a *Participatory Evaluation Roadmap* comprising 4 phases and 14 major processes or activities, as illustrated below. It has also undertaken evaluation processes with

some participatory components. This has entailed the incorporation of strategic workshops that have significantly improved the quality of the information, the evidence and the findings, as well as the relevance of the recommendations, which has favoured their use and the ownership of the improvements to the public policies evaluated.

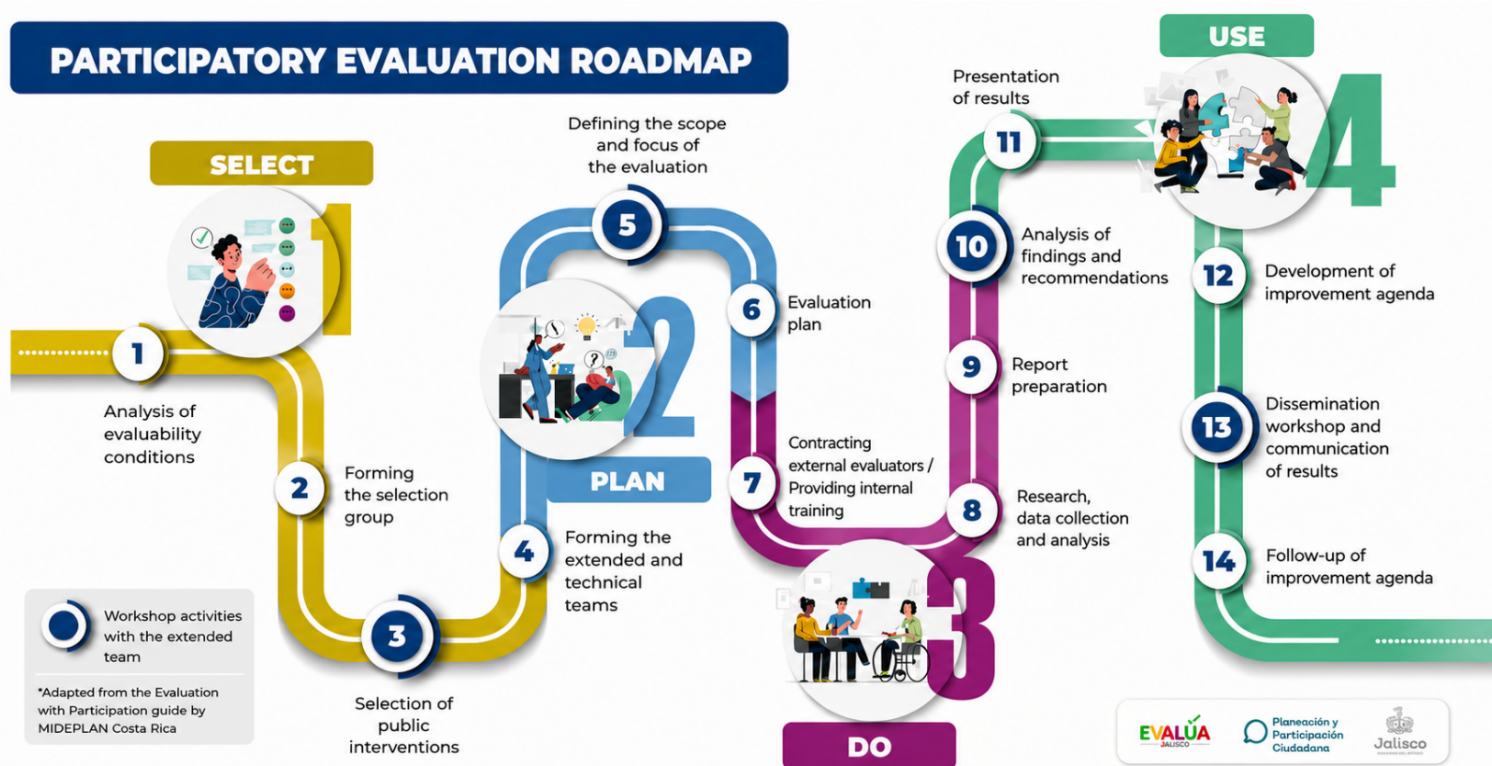


Figure 2. *Evalúa Jalisco Participatory Evaluation Roadmap*

From the perspective of the public sector, evaluation is a process of four major phases that involve selecting, planning, conducting the research and using the information. The process entails the coordination, management and facilitation of the various activities. In contrast to what is usually identified as evaluation, which involves the research, the gathering of information,

its analysis and the generation of recommendations: for Evalúa Jalisco, evaluative research is merely one of the phases of evaluation. Although the details of the participatory evaluation roadmap, which includes a participatory workshop for each phase, are not addressed in this document, Evalúa Jalisco is in the process of publishing the *Participatory Evaluation Guide*, based on the experience of having completed four

participatory evaluations covering the entire roadmap.

Although Evalúa Jalisco considers that a Participatory Evaluation entails following the entire roadmap incorporating the various stakeholders, in practice, innovative processes were developed to incorporate the participation of diverse stakeholders in some of the activities — essentially operators, specialised non-governmental organisations and users/beneficiaries. Evalúa Jalisco's experience showed very positive results from introducing participatory mechanisms in the Workshop for the Analysis of Findings and Recommendations. This has been applied to four programme evaluations.

According to the *Ibero-American Charter of Citizen Participation in Public Management*, participation in public management reinforces the active position of people as members of their communities; it enables the expression and defence of their interests, the harnessing of their experiences and the strengthening of their capacities, thereby contributing to improving the population's quality of life. Participation, on its various scales, ranges from participating at the most basic level in consultation processes to the deepest extreme of participating by influencing decision-making. It is precisely here —at this level of recognition of processes of influential participation, recognising the interaction of the various participants in the management and functioning of a public policy— that Participatory Evaluation is situated.

Participatory Evaluation arises from the identification of two needs and the recognition of a human right:

- **The principle of inclusion.** Based on the right to equality, we identify the need to include all parties involved in the functioning of a public intervention in order to advance along the path to development proposed by the 2030 Agenda —that of advancing *without leaving anyone behind*— as set out in Mideplan's *Guide to Evaluation with Participation*.
- **Complex problems require systemic perspectives.** Most of the public problems faced by government programmes are complex, which makes it essential for all the stakeholders involved in the design, implementation and monitoring of a public policy to take part in the decisions to improve its functioning and to achieve the solutions proposed. Complex problems interact as systems in which all the parties involved are interconnected and require one another in order to be transformed.
- **The greater the participation, the greater the use of the evaluation.** Managing an evaluation is no easy task: it requires time, financial resources, an optimistic attitude and the motivation that it is possible to break with inertia, to win over the will of others and to influence the decisions of political authorities in order to improve a public intervention. Reaching the conclusion of an evaluative research study is often an uphill process; it might seem that

having the evaluation reports amounts to achieving its purpose; however, in terms of being a government body, this is perhaps only halfway along the road.

If the purpose of an evaluation is the improvement of public policy, the use phase that arises after the evaluative research is fundamental to achieving improvements and, thereby, to attaining the objectives of the public policy. Thus, at Evalúa Jalisco we have a need to improve the use of the information and of the lessons learned, and so we start from the hypothesis that Evaluation with participatory mechanisms will generate better conditions for increasing the use of the findings of the evaluative research, but above all of the lessons learned during the participatory process of managing the evaluation.

Participatory evaluation in Jalisco: the case of the Mi Pasaje Transport Support Programme

Evaluating with participatory mechanisms from within the public sector

Unlike “traditional” evaluations, which mainly serve the needs of decision-makers, political legitimacy or

accountability, Evaluations with Participation place greater emphasis on the ownership and learning of the various stakeholders involved in the functioning of a public policy who, by being involved in the evaluation process, in negotiation and in the capacity for dialogue, generate a systemic perspective for addressing the complex problems that the public intervention seeks to change.

Participatory Evaluations require, of public officials, a change of mindset and the use of new tools in order to create spaces of proximity, equality, trust and collaboration that foster and accept co-creative decisions. For participants from outside government — whether evaluators, expert citizen participants, users or beneficiaries, and operational intermediaries— they require trust and knowledge of administrative and bureaucratic processes. There is no doubt that incorporating participatory mechanisms into evaluation demands of everyone more time, dedication, empathy, openness and a new outlook —that of seeing the other as a valid interlocutor, understanding the intervention as a system of multiple interconnected stakeholders who are indispensable for achieving the results expected by the community—.

It is worth noting that the following steps —specifically the first two— are additional to the Participatory Evaluation Roadmap of Jalisco, and relate to the preplanning and the decisions that should be considered before beginning the process. This helps to create a favourable, contextualised and manageable environment, in line with the needs and resources

available, in order to successfully complete the full participatory evaluation roadmap. This primarily involves senior management and key decision-makers.

The first step in the Evaluations with Participatory Approaches project³⁵, which began as a result of the collaboration and agreement signed with Focelac and Mideplan as mentioned above, consists of deciding on the degree of participation of the stakeholders — that is, deciding the phases and activities in which the various stakeholders will be involved. This degree of participation in the evaluation process may vary depending on the intervention in question, although in all cases the highest degree is sought — that is, that the stakeholders be involved in as many phases and activities as possible. Thus, up to now, the incorporation of multiple stakeholders in all the evaluation stages, or in any one in particular, has been a deliberate choice on the part of the public sector. Nonetheless, as detailed below, steps were taken to open up the process.

By way of example, in the first exercise of evaluation with participatory approaches —that of the Mi Pasaje programme— the stakeholders began their participation in the Design phase of the evaluation. By contrast, in the four evaluations launched in 2020, the

³⁵ In 2019, the Government of the State of Jalisco, through the Secretariat of Planning and Citizen Participation, launched the “Evaluations with Participatory Approaches” project, with the aim of improving evaluation management processes and increasing the “evaluation culture” in the state through the incorporation of innovative methodologies. The project was guided by, and arose from, the collaboration and agreement signed with Focelac and Mideplan.

participation of the stakeholders started from the very outset, with the decision on which interventions would be evaluated.

The second step in evaluations with participatory approaches consists of the preliminary mapping of stakeholders, which is complemented in the evaluation planning phase and which makes it possible to profile the working groups: the Extended Working Group and the Technical Team. The former is a group made up of people representing three types of stakeholders: Government (public officials, intervention managers, evaluation managers), Beneficiaries of the interventions, and Citizens (academics, representatives of civil society organisations, external allies, etc.). The Technical Team is a subgroup made up of one representative of each of the three types of stakeholders, whose functions are more operational and logistical.

The third step consists of carrying out each of the phases and activities of the Participatory Evaluation Roadmap with the Extended Working Group and/or the Technical Team, as established in the first step. It is worth noting that all activities are carried out using participatory techniques, such as: Timelines, Roleplay, Sociograms, Visual Maps, Brainstorming and the World Café, among others. The application of these techniques depends on the particular objectives of each activity.

It is important to mention that, although in the case of Evalúa Jalisco —as occurs in some evaluations at Mideplan— the collection and analysis of data, the

preparation of the report and the workshop for the analysis of findings and recommendations (steps eight, nine and ten of the “Doing” phase in our participatory evaluation roadmap) are carried out by external parties through tendering or contracting processes based on the Terms of Reference, there are experiences of national and subnational governments in which these activities are carried out by intergovernmental research teams, which entails training processes for the collection and analysis of information.

According to Evalúa Jalisco’s Participatory Evaluation Roadmap, Phase 3 (Doing) includes activities 7 (Drafting of Terms of Reference for the Contracting of External Evaluators), 8 (Research and gathering of information), 9 (Preparation of the Report) and 10 (Workshop for the Analysis of Findings and Recommendations). Steps 8, 9 and 10 are those that are actually outsourced; the rest of the roadmap is coordinated and managed by the governmental team of Evalúa Jalisco with the participation of the Extended and/or Technical Group.

It is worth noting that, in the case of Evalúa Jalisco, there was methodological facilitation support across the various participatory evaluations, mainly for the workshops, identified as activities 3 (Workshop for the Selection of public interventions to be evaluated), 5 (Planning Workshop for defining the scope and object of evaluation) and 13 (Workshop for the dissemination and communication of the results).

The Mi Pasaje Programme

The Mi Pasaje intervention is a social programme at state level that began operating in 2013 (previously called Bienevales) and which, for the 2019 financial year, operated with a state budget of 155,820,587 Mexican pesos (equivalent to 8.2 million US dollars at the July 2024 exchange rate), making it one of the programmes with the greatest social acceptance and budget in Jalisco. It consists of granting a direct subsidy of the cost of public transport in the Guadalajara Metropolitan Area and in 9 municipalities in the rest of the state to three sectors of the population: students, older adults and people with disabilities. The programme’s objective is to provide accessibility to the public transport service in order to contribute to the household economy of older adults over 65 and people with disabilities, and of students at the lower-secondary, upper-secondary and higher-education levels of the state of Jalisco, with an income below the welfare line, through a transport subsidy mechanism.

By 2019, the year in which the evaluation began, the beneficiary users with transport support totalled 162,486: 90,005 students, 65,752 older adults and 6,729 people with disabilities.³⁶

The selection of the Mi Pasaje Programme as the first participatory evaluation exercise at Evalúa Jalisco was

³⁶ In 2024 the Mi Pasaje Programme contemplates extending its coverage to a fourth population group: women. For further information, see <https://misprogramas.jalisco.gob.mx>. [Note from the editors: As of 2026, women who are heads of households are also eligible for the programme.]

based on a couple of criteria and through a process comprising several activities. The selection criteria were:

- **The budgetary and strategic relevance of the programme:** Mi Pasaje is one of the social programmes with the largest budget (state resources) and the largest registry of users/beneficiaries.
- **The consistency of the available information, which would enable access to data, historical series and information for analysis:** the programme began in 2013 with support for students only; in that year an evaluation of its design and operation was carried out, resulting in information-recording processes that were maintained and that were followed up in 2015 by Evalúa Jalisco, the same year in which it increased support for the older population and people with disabilities.
- **Having the willingness and openness of the programme's management team and of the institution in charge to carry out the evaluation:** without the openness and willingness to be evaluated, it would have been extremely complicated and difficult to achieve the process and the results obtained.

For this third criterion, Evalúa Jalisco developed a process of information, training and awareness-raising. In 2019, as the first action along the Participatory Evaluation roadmap in Jalisco, an Open Conference was organised for interested parties, delivered by Andrea Meneses, of Focelac, who had taken part in a participatory evaluation in Costa Rica coordinated by

Mideplan. Likewise, an informational talk was held with the officials from the agencies of the Government of Jalisco who are designated as evaluation liaisons and who are responsible for advancing the evaluation agenda in their institutions, as part of Evalúa Jalisco's network of formal liaisons.

In the following months, materials, documents and experiences were distributed to the network's liaison officials, along with the news of the conclusion of the international collaboration and cooperation agreement to carry out the pilot exercise with Focelac and Mideplan; this entailed the Evalúa Jalisco team holding several meetings with the Focelac and Mideplan team in order to understand and define the work plan, as well as to get to know the external facilitator of the process.

Once the terms of the cooperation and the work plan had been defined, the Evalúa Jalisco team identified 2 programmes that met the first 2 criteria (the budgetary and strategic relevance of the programme and the consistency of the available information); we held discussions with our fellow evaluation liaison officials in the agencies, and only one expressed interest and institutional willingness. They, who are allies (being internal evaluation units), arranged a further meeting, this time with the programme's management team. The challenge with this team was that they had no prior experience of participatory evaluation, which required a couple of unhurried and empathetic conversations with the director and his team. We explained the Costa Rica experience and the planned process, raising awareness of and motivating them with the approach

of using evaluation to improve the programme itself. We also presented them with the map of stakeholders that we had identified to accompany the process, and proposed criteria for choosing the users who would be invited to participate as the Extended Group, leaving the selection of these users to them.

We can situate the Mi Pasaje intervention as a policy at subnational level that seeks to mitigate the expenses of the three population sectors already mentioned, in line with Social Development rights, as set out in the *State Plan for Governance and Development 2018-2024 – Vision 2030*: by supporting transport and setting out various objectives by beneficiary population, with a goal-level indicator (the Gini Coefficient), it seeks to reduce the public transport fare by 50% so that beneficiaries can use those resources in other areas. Tickets are provided, whether printed or via an electronic card, to the population sectors already mentioned, in order to help towards their transport costs.

The Evaluation with Participation of Mi Pasaje and its phases

It was thus that, in 2019, work began on what would become an Evaluation with Participation conducted by the Evaluation Unit and the Evalúa Jalisco Strategy, which was supported by Focelac. This exercise was carried out through the joint work of the Social Development Coordination Office, the General Secretariat of Government, the Secretariat of the Social

Development System and the Secretariat of Planning and Citizen Participation, through its evaluation unit. In order to account for the way in which the participatory evaluation of the Mi Pasaje programme was carried out, we have organised this section according to the phases presented earlier: Planning, Doing and Use, presenting the key actions taken in each of them and reflecting on the achievements and challenges encountered.

Plannig

In the first instance, introductory talks were held with the programme's directors and operators. At the same time, the evaluation unit began to plan what would become the first Planning Workshop for the evaluation with participation of the Mi Pasaje programme.

We can state that this phase entails one of the highest levels of participation, since it involves forming the extended and technical teams; delimiting the scope and object of evaluation; and preparing the Evaluation Plan. The delimitation of the scope and object of evaluation was carried out in the participatory Planning Workshop. To do so, various working meetings were held with the facilitator contracted by the Focelac project³⁷ and with fellow public officials from Mideplan in Costa Rica. In these meetings, the methods for collecting and systematising the information obtained in the planning workshops that had been carried out in both countries were shared. Furthermore, in this phase, another in-person workshop was held—the Workshop for the validation of the terms of reference—

³⁷ Dr Juan Murciano, from Andalusia, Spain.

in which the methodology for collating the information obtained in the first workshop was explained, the work carried out by the technical team was presented, and interactive group activities were used to seek the approval of the final evaluation questions, the criteria and the type of evaluation (by part of the extended team).

The Participatory Workshop for the Planning of the Evaluation: What to evaluate? was carried out with the extended group over the course of a week in November 2019, with 4 sessions of 5 to 6 hours in an in-person format, in which we, members of the Extended Group, got to know one another, learned the details of participatory evaluation, understood the objective and the theory of change of the Programme to be evaluated and, above all, we were able to establish the evaluation questions —that is, what we wanted the evaluation to answer for us—. ³⁸

The main moments and techniques used in the participatory evaluation Planning workshop:

³⁸ It is worth noting that, for Evalúa Jalisco, one of the most significant stages in terms of levels of participation and information gathering is the evaluation planning workshop —a key moment for pooling knowledge, for reframing the traditional evaluation process into the participatory evaluation process, and for building the trust needed to generate changes with public value—. We therefore consider the planning workshop to be a requirement of the utmost importance when carrying out a participatory evaluation from within government.

- *Definition of evaluation*: starting from a brainstorming session, a collective definition of evaluation and its objectives was constructed.
- *Evaluation roadmap*: identification of the phases and activities involved in the evaluation process.
- *Reconstruction of the object of evaluation in working teams* made up of at least one representative of each stakeholder involved.
- *Collective construction of the results chain*: the inputs, activities, goods or services and results that make up the intervention were identified collectively.
- *Formulation of the evaluation questions*: through a brainstorming session, the teams put forward questions or matters they would like to explore about any aspect of the intervention.
- *Identification of the evaluation criteria*: collectively, the questions were organised into an Evaluation Map.
- *Establishment of the evaluation roadmap*: once the questions and their respective criteria had been defined, the Evaluation Roadmap or Timeline was established. Along a timeline, the next steps to be taken are agreed, the roles or activities of the participants are defined, and the responsibilities and other agreements for the evaluation process are established.

Stakeholders	Members
<i>Evaluation Unit of the Government of Jalisco (Evalúa Jalisco)</i>	A team comprising officials from the Directorate of Evaluation for Public Improvement and the person holding the post of Director-General of Participatory Planning and Evaluation
<i>Management team</i>	A team comprising officials from the Government Evaluation Unit (Evalúa Jalisco), a representative from the General Strategic Coordination Office for Social Development, two representatives from FOCELAC, as well as the heads of the Directorate General for Programme Planning and the Directorate of State Programmes at the Secretariat for the Social Assistance System (SSAS).
<i>Technical team</i>	A team comprising three officials from the Government Evaluation Unit (Evalúa Jalisco), two representatives from the Directorate General for Programme Planning, one representative from the Directorate for State Programmes of the SSAS, and one representative from the General Strategic Coordination Office for Social Development.
<i>Extended working group</i>	Comprising the technical team, representatives of the TISA company (the programme's intermediary organisation), the Secretariat for the Social Assistance System (SSAS), the Secretariat for Transport (ST), the Secretariat for Planning and Citizen Participation (SPPC) and at least two beneficiaries per programme component.

Table 1. *Stakeholders participating in the Evaluation with participatory mechanisms of the Mi Pasaje programme.*
Source: produced by Evalúa Jalisco

On concluding the workshop, the technical team systematised and processed the information gathered in order to prepare the proposed Terms of Reference, which was then put to discussion with the extended working group.

A total of 125 questions arising during the workshop were assessed; these were grouped according to the criteria reviewed during the workshop, with the majority corresponding to criteria of quality, followed

by Effectiveness, Relevance, Coherence, Efficiency and Sustainability.

Once the Terms of Reference had been validated by the Extended Group, the lengthy administrative process of contracting the evaluation team was carried out.

As regards the achievements in this first exercise, we realised that we managed to adapt the existing tools within the State government for communicating what we wanted to do and how we wanted to do it, as the existence of the state planning liaisons was the key

to enabling communication to flow more smoothly and effectively —which reflected directly in the outcomes achieved through the implementation of the improvements to the programme arising from this evaluation.

The challenges at this stage were of various kinds: at the interinstitutional level (since talking about innovative exercises in the evaluation of programmes or public policies involved dialogue), it was necessary to persuade, and even to train, those involved in the evaluation facilitation processes; at the internal level (which entailed carrying out, in a different way, the technical work that had always characterised the State's evaluation unit — developing terms of reference from the compilation of the local knowledge of the programme's own beneficiaries, planners, operators and directors), it meant finding a language that was comprehensible to all those involved, as well as a sharing of common ground that, without losing methodological rigour, was playful and accessible.

Doing

We can maintain that this stage entails consultative participation at the end of the research, since the tendering processes are strictly internal due to their administrative nature. The Roadmap identifies the actions of the Drafting of Terms of Reference and the Contracting of external evaluators in the case of Evalúa Jalisco, the Conduct of the research and gathering of information, the Preparation of the Report

and the Workshop for the Analysis of Findings and Recommendations. Owing to the Covid19 pandemic, the process of contracting the Evaluation Team was considerably delayed. Once it became possible, it was carried out through a National Public Tender — an open and transparent competition in which all evaluation teams meeting the technical requirements may take part. In Jalisco, at the moment an evaluation is awarded, an initial meeting is held with the team; on this occasion the aim was to immerse the team as fully as possible in the process that was already under way within the evaluation with participation of the Mi Pasaje programme.

With regard to the administrative process, the procurement request was successfully submitted in March 2020; however, during the pandemic there was a period of uncertainty surrounding the National Public Tender processes (April–July); in the months of August and September the call for tenders was published, and with it, by October, the decision and the notification of the selected evaluation team were obtained.

Once notified and with the research work under way, the evaluation team committed to six specific deliverables: the evaluation project, the preliminary report, the participatory workshop for the analysis of recommendations, the final report, the infographic and the presentation of results. Likewise, owing to the delay in the face of the Covid19 contingency, it was necessary to hold a virtual meeting with the Extended Group in order to reflect on the new possible

scenarios for the evaluation, possible adjustments to the programme and any implications for the objectives and/or questions of the evaluation.

Finally, the participatory workshop for the analysis of recommendations was held. That is, before completing the research work, the evaluation team gives a presentation of results in the form of a workshop, where the recommendations were analysed and, in some cases, reformulated and approved by all the stakeholders involved (the extended team), envisaging the application of participatory methodologies or techniques and the participation of all the stakeholders involved in the evaluation.

The evaluators made 18 recommendations, on the basis of which 14 commitments to action were established in the Improvement Agenda. The positive and negative findings, as well as the summary of recommendations, were placed in the evaluation infographic.³⁹

One of the challenges that became one of our most significant achievements in this phase was to adapt and bring into line the way in which the external evaluators had been approaching the participatory approach; this meant inviting the team to position itself from a different facet and from an analytical perspective other than the one they were accustomed to working

with: one that was understood more as a technical and methodological facilitator of the processes and a source of support for resolving doubts, building trust and horizontality, and acting as an ally to the intervention that helps to improve it. In addition, they were invited to learn more about what the participatory methodology entails, with material on the subject shared with them as support for carrying out the evaluation in line with this approach; finally, they were invited to share their experience on a panel during evaluation week, as well as to take part in and be students of the first cohort of the Diploma Course in Participatory Evaluation of Public Policies from within Government, described above.

It is important to say that, although this was achieved with three of the four evaluators in charge of the projects carried out by Evalúa Jalisco, it was not the case for one in particular, with whom the change of paradigm was not achieved: we did not manage to convey to him the importance of participatory processes in evaluations, nor was this new role of the evaluator understood; there were tensions and conflicts in achieving the purpose. Nonetheless, given the robustness of the terms of reference, the contract and the knowledge and experience of the management team, it was possible to carry the project through as stipulated — although neither the change nor an understanding of the importance of participation, that new role and those new functions in his work was achieved; nor was any collaboration achieved beyond the project. It stands out that, thanks to this, it was indeed possible to strengthen, in future terms of reference, the importance

³⁹ Details of the evaluation, reports and presentations are available at https://evalua.jalisco.gob.mx/wp-content/uploads/2024/08/Infografia_EcP_EMT_0.pdf. Details of the improvement agenda are available in the Evalúa Jalisco Improvement Agendas System at <https://agendasdemejora.jalisco.gob.mx/panel/verAgenda?id=130>.

and weight of the evaluator's profile, both in terms of specific experience and of training.

Use

This was one of the key stages for the implementation of the recommendations arising from the research. The support and willingness that the members of the extended team showed in the working sessions was always one of cooperation and contribution, even despite the issues arising from the Covid19 pandemic. In the Participatory Evaluation Roadmap, this is the Phase with the greatest number of activities and processes, which involve: the Presentation of results, the Preparation of the improvement agenda, the Workshop for the dissemination and communication of the results, and the Follow-up of the improvement agenda.

Within the Evaluation Unit of the government of the state of Jalisco, there is a consolidated strategy for the use of evaluation, since the Improvement Agenda System has been developed—an online platform that helps the operators and decision-makers of the programmes to define and communicate the recommendations, consolidating them as commitments to improve the evaluated programmes themselves—. The Improvement Agendas strategy consists of providing support in carrying out the activities arising from the commitments previously accepted by the planning liaisons. It also makes it possible to report on and monitor progress in fulfilling these activities and commitments for public improvement. It is worth mentioning that

the acceptance of the recommendations arising from participatory evaluations is higher: in the case of Mi Pasaje, 18 recommendations were obtained, of which 14 became commitments and were taken through to implementation for the improvement of the programme; work on some of them began as early as the planning workshop, owing to the closeness of the co-creative work of the operators, decision-makers and the programme's beneficiaries themselves.

The process of formalising or consolidating the Improvement Agendas in the state of Jalisco involves four short stages:

- the signing of an Institutional Position Statement by the planning liaisons responsible for the programme,
- the carrying out of the Analysis of Recommendations by the programme's operational staff and those responsible for it,
- the Establishment of Commitments, and
- the Follow-up through to their Conclusion.

This process is carried out in all the evaluations conducted by the State's Evaluation Unit: in the case of the formalisation, implementation and follow-up of the Mi Pasaje agenda, a new process of mutual support was carried out between the programme's director, the public transport implementers and the Evaluation Unit: the participatory work was key to understanding the importance of applying these commitments. In this case, the negotiations for fulfilling the agenda took place between the Planning and Programming Coordinator of the Secretariat of Transport (ST) and

the Director of State Programmes of the Secretariat of the Social Assistance System (SSAS), with the advice and guidance of the Evalúa Jalisco unit of the SPPC.

Also in this phase, in the case of Mi Pasaje, two further follow-up workshops were held. One, led by Focelac one year after the research work had been presented and concluded, was the Follow-up workshop “Was it worth it?”, where all the stakeholders involved in the evaluation process were brought together again; the aim was to revisit the improvements implemented as a result of the evaluation with participation, to gauge the views of the stakeholders involved in the process, and to reach action agreements for the completion of the improvement agenda arising from the evaluation (since, at that point, some activities in the improvement agenda remained to be completed). The other, of participatory activities, took place a few months later and was led by the State’s Evaluation Unit itself; it was an exercise in presenting and disseminating all the work carried out and implemented by the programme’s operators, addressed to all the members of the Mi Pasaje programme’s working team.

As part of the achievements in this phase, it should be clarified that all the programme’s operational staff had the opportunity to learn what this participatory evaluation process was and how it was carried out, since, once the process had concluded and the follow-up workshop had been held, a process of disseminating the work was set in motion that had never before been undertaken.

Effects identified from the evaluation of the Mi Pasaje Programme

Another aspect that has permeated participatory evaluations in Jalisco is the improvement in the results of the evaluated interventions; this has been achieved partly thanks to the generation of more relevant evaluation questions and to the level of knowledge contributed by the various stakeholders, which ranges from the technical expertise of academic specialists to the experiential knowledge of beneficiaries and operators in the day-to-day running of the programmes. These questions have produced an increase in learning and in the understanding of the evaluated interventions.

Our hypothesis is that changes to the programme began as early as the first evaluation planning workshop. Following interviews and conversations with fellow operators and directors of the programme, they told us that listening in spaces of reflection and dialogue with beneficiaries, as well as with all those involved in the programme, enabled them to understand different perspectives and problems faced by both users and drivers.

According to the implementers, before concluding the evaluative research the programme itself made substantial changes:

- **Waiting times at the service points:** year after year, attention to beneficiaries has been improving.

In 2019, the average time was 40 to 50 minutes per person; by 2020 it was reduced to 30 minutes, while for the service that began in 2022 the average is 15 minutes.

- **The reinforcement of the initiative to migrate from the physical ticket to the electronic card:** in the workshops, the argument of the benefit to users was strengthened, given that using an electronic card—as nonbeneficiaries do— prevents discriminatory treatment by drivers.
- **The reduction of the number of documents required:** previously 4 documents were requested and now only 1 is required, plus proof of study in the case of students.
- **The improvement in the use of transport itself:** beneficiaries complained that, on some routes, on seeing that people had a ticket, the bus would not stop for them.

For their part, the managers of the interventions have shown an increase in their acceptance of being evaluated, since the process has enabled them to understand that the purpose of evaluations is constructive and that it seeks learning and continuous improvement rather than sanction and punishment — that is, they have been able to identify a benefit—.

All those involved in the process, especially the beneficiaries and citizens, responded positively to the recognition of their capacity to contribute and to generate knowledge that leads to improvements. They adopted a stance of empowerment and came to see themselves as leading stakeholders of the change they

wish to see generated, and not merely as observers and recipients of government benefits.

The training and capacity-building mechanisms for all those involved in the process are undeniable, they enable closer ties to build teams and to work towards common ends across all spheres. This has facilitated continuous institutional learning and growth, as well as greater closeness to the population involved in the process.

Nonetheless, the sustainability of this practice does not escape facing some challenges, the most notable of which is the great deal of management effort and time on the part of the coordinating/facilitating teams, since the participation of a wide diversity of stakeholders entails the complicated task of adjusting availability, timing, schedules, spaces, and so on. Much of the success of this kind of practice requires a high level of commitment and participation from all the stakeholders involved.

The duration of evaluations carried out with participatory approaches increases considerably. Conflicts also arise between approaches and points of view. Having a greater diversity of stakeholders enriches the information, the practice and the learning, but this entails a greater challenge: placing the common good above particular interests and reaching agreements and consensus with all the participants —something that is not always possible to achieve—.

A lack of competences, skills or abilities in matters of evaluation, or in any matter related to the process, tends

to be a challenge that must be overcome at the start of evaluations with participation. To this end, initial training sessions and formative workshops on these topics were carried out, so that all the stakeholders stood on a minimum common ground. Added to this was the context of the Covid19 pandemic, which forced us to resort to digital platforms with which most of the stakeholders involved were not familiar, entailing additional processes of training in digital literacy. Finally, there was the task of adapting the content and terminology of participatory evaluation for a less technical and academic understanding among the diversity of participants. All of this without losing sight of the strong formative and capacity-building component that the process entails.

Lessons learned and challenges from the experience of Evalúa Jalisco

In the following lines, the knowledge constructed from the authors' experience is offered analytically, with the intention that the reflections, lessons and challenges arising from the participatory evaluations managed by Evalúa Jalisco may serve other readers interested in carrying out this kind of evaluation practice in their own contexts.

Some of the advantages inherent in incorporating participation into evaluation processes include a

strong formative component through which capacities are developed in all the stakeholders who take part: such is the case of the need to create a level playing field among the participating group — making use of popular education, with simple analogies from everyday life and playful tools with very concrete objectives, it becomes possible to explain and provide training on what an evaluation entails, what a criterion is, how evaluation questions are constructed and defined, where a finding or a recommendation comes from, and so on. This process helps to build trust and horizontality within the group, in addition to contributing to the generation of evaluations with more relevant questions, objectives and criteria, adapted to the contexts in which the evaluations are conducted. Like any process oriented towards learning, it requires time, additional effort and adaptation of the methodology and the tools used, which must be focused on placing the stakeholders at the centre, never losing sight of who the participants are and what particular needs or characteristics they have for learning and for developing their participation.

On the other hand, one of the strong criticisms that have been made of this kind of evaluation is that, as mentioned, the processes involve training and adaptation, which is why the times for completion tend to be longer than for conventional evaluations; however, an important element — in addition to those mentioned in this document — is the fact, highlighted here, that improvements to interventions may, and tend to, arise from early stages such as the planning phase, since, with different stakeholders taking part in the processes (ranging from the intervention's

decision-makers to the operators and beneficiaries), it is possible that, without the need for a final evaluation report, necessary and relevant improvements are detected, expressed and fed back by the different stakeholders, which can be implemented in parallel to the evolution of the evaluation.

The foregoing has implications for greater use by policymakers, both of the evaluation results and of the process itself. A first reflection of this is, as has been seen, an increase in the percentage of acceptance of recommendations within the mechanism implemented in Jalisco for following up and applying the recommendations arising from evaluations: namely, the Improvement Agendas. Following an evaluation, the recommendations are analysed and subjected to an assessment of feasibility, viability and the availability of human and material resources, between the central evaluation unit, the operators and the decision-makers of the programme, in order to become commitments to improve the programmes. These set out activities, completion dates and means of verification, fed in real time by the liaisons of the agencies, and can be monitored publicly through the public platform.⁴⁰

Another aspect that it is considered important to clarify is that a Participatory Evaluation, or one that considers participatory mechanisms within its process, does not entail a loss of technical or methodological rigour: this is a relevant, necessary and non-negotiable factor

in any kind of evaluation. The truth is that it is also considered equally relevant to bring together a diverse team under principles of collaboration, horizontality and trust, since this generates more relevant processes and is, moreover, an important component for the sustainability of the changes after the evaluation.

For its part, at Evalúa Jalisco the terms of reference are drawn up to strengthen both the mechanisms that foster methodological and technical rigour and the atmosphere of collaboration, horizontality and trust, as for any other “traditional” evaluation. To this end, clear objectives are considered, emanating from research questions associated with evaluation criteria (all of them participatory, arising from selection and planning workshops), and the Evaluation Matrix is developed within them. On the one hand, the matrix must contain a proposal by the evaluator/facilitator which, associated with those criteria, questions and objectives, is complemented by a robust methodological design proposal that is appropriate for answering the questions. On the other, it must contain data collection and analysis techniques, as well as their sources and the participatory mechanisms that will be used—and in what way, or to answer which question—.

Within this document, the experience, training, skills, education and area of expertise of the evaluation/facilitation team in relation to the object of study and the participatory approach to evaluation are assessed, by means of a rubric of points and percentages.

On the other hand, for the phases and stages in which an external party is not involved, and which are

⁴⁰ The public platform is available at <https://agendasdemejora.jalisco.gob.mx/>.

carried out by the Evalúa Jalisco team, evidence of the processes is generated and documented publicly through the Evalúa Jalisco platform, the Improvement Agendas and the various social media. In addition, within the team, diversity and complementarity of profiles are sought, as well as constant training, in order to learn the tools and develop the skills required in participatory evaluation processes, acting in the Selection, Planning and Use phases as managers, but also as facilitators of the processes. An example of the foregoing is the development and implementation of the Diploma Course in the Evaluation of Public Policies from within Government, which, in collaboration with the Jalisco College, is aimed at officials, evaluation managers and evaluators interested in replicating these processes, and which now has a second cohort. It is worth noting that the Evalúa Jalisco team takes part both in the development and delivery of content and in the tutoring of the students taking the diploma course.

The training and capacity development of the evaluators, facilitators and managers of the evaluations takes on importance because, in participatory processes, tensions arising from the diversity of opinions are normal and desirable: embracing conflict, and having and developing the skills to know how to manage that conflict between the parties in a constructive and efficient way (achieving collective intelligence), is the duty of the management, facilitation and evaluation teams. It is, moreover, another of the fundamental elements that must permeate a participatory evaluation process in any of its phases, since without it, it would not be possible to reach consensus and

generate collective and relevant results. The evaluators take on a new role as facilitators of the process and of the transformation following the use of the information gathered, and should preferably take part in the entire process, whenever the regulatory framework of each setting so allows.

Participatory Evaluations require a change of mindset on the part of officials and the use of new tools in order to create spaces of proximity, equality, trust and collaboration that foster and accept co-creative decisions. For participants from outside government —whether evaluators, expert citizen participants, users or beneficiaries, and operational intermediaries— they require trust and knowledge of administrative and bureaucratic processes. There is no doubt that incorporating participatory mechanisms into evaluation demands of everyone more time, dedication, empathy, openness and active listening in order to move from “mine, yours, theirs” to a clear “ours” with a new outlook: beginning to see the other as a valid interlocutor, understanding the intervention as a system of interconnected and indispensable multiple stakeholders needed to achieve the results expected by the community.

Another aspect that becomes relevant when carrying out participatory evaluation processes has to do with balancing the extended teams that will be formed to take part in the decisions that will guide the evaluation. This is a key factor in avoiding possible future biases in the development of collective intelligence. What do we mean by this? The fact that, at the moment when the

different stakeholders are invited to participate, the aim should be for the groups by type of stakeholder (government, citizens, CSOs, partner institutions, etc.) to carry equal weight, attempting to ensure that the same number of people participate per representation group, which will allow for a distinction of approaches, creative solutions and conflict between perspectives, but without polarising or biasing in favour of majorities. This tends to represent a considerable challenge given the differing availability of some to participate compared with others; nonetheless, this aspect is considered crucial: if it is attended to from the outset, it will allow for a better development of the whole process.

Within these extended working teams, the importance of the evaluation managers stands out in ensuring that those in charge of evaluations within the agencies and programmes become strategic allies, convinced of the importance of the process and of the participation of the different stakeholders for a better result that benefits all those involved. Their role is key for the convening/inviting of beneficiaries/users to participate, and for the very knowledge of the programme's operation and its results, as well as for verifying the possibilities the evaluated intervention has of being maintained and for agreeing some mechanism that may help to guarantee its continuity beyond two years.

Likewise, although the participatory approach can be used in any kind of intervention to be evaluated (thanks to the adaptation of tools and the permitted adjustment of the assessment elements for the different objectives and settings of the evaluation), it is

suggested/recommended that, in contexts where this kind of process is being undertaken for the first time, a profile be sought for users/beneficiaries that entails a certain level of continuity—that is, that they not be one-off-contact interventions, but rather beneficiaries who will hold that status for at least a period of one year or more. This contributes to the difficult challenge of ensuring that beneficiaries, in particular, continue participating throughout the entire evaluation process—. In this same sense, it is suggested that care be taken over the type of user/beneficiary—referring to those who have been denied or had interrupted one or more of their human rights— given the nature of such cases and the special care needed in order to avoid re-victimising them or exposing them to processes that are uncomfortable or that are not ideal for the benefit of their situation. In this regard, it should be clarified that it is not that this kind of approach is not recommended in such cases: on the contrary, it is considered entirely appropriate; however, a certain level of experience in this respect is indeed required in order to achieve it without causing harm to any actor.

Finally, as part of the authors' reflections, challenges and lessons learned, it is considered important to mention that, although this endeavour involves sharing—from an experience of public-sector work—the things that have worked, those that have represented a challenge and those that are considered appropriate to adjust or replicate, it is important to recognise that, even though there are certain conditions in the environment that must permeate this kind of process and some premises that must be guaranteed, there is

no ideal scenario for taking the decision to incorporate more voices into the decision-making over whom, what and how to evaluate in public interventions, because the ideal context does not exist: in our experience, it is more a decision that is taken in the knowledge that it will entail navigating situations previously unknown in “traditional” evaluation processes. It thus entails changing the paradigm and ceding the power that was previously believed to be the territory of only a select few who mastered the technique and a certain terminology; when that premise is overcome, spaces are opened up to create creative solutions to the complex problems experienced in the different contexts, and bonds are generated that extend beyond the evaluation processes and the improvements achieved in the interventions.

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