

Chapter 8

Participatory Evaluation

3 Public Interventions in the State of Zacatecas (2020)

Janett Salvador

Abstract

With a disruptive approach, the team leading the state evaluation system in the Mexican state of Zacatecas became pioneers by evaluating three public interventions in a participatory manner. Two elements of innovation were identified. First, the paradigm of evaluating programmes was broken, as the evaluations covered a project within a strategy, a component of a programme, and a cross-cutting model; the main feature of these interventions was that, from their design and implementation, they had experiences of citizen participation. The second innovative element was the inclusion in the evaluation's decision-making process of those responsible for implementing the interventions and/or those who had participated in other stages of the interventions. This chapter documents the process, the challenges and the lessons learned. Whilst each participatory evaluation process is unique due to its specific characteristics, they can serve as a basis for the design and implementation of other evaluations with which they share certain similarities.

Keywords

Participatory Evaluation, Evaluation Of Public Interventions, Zacatecas.

Citation

Salvador, J. (2024). "Participatory evaluation. 3 public interventions in the State of Zacatecas (2020)". In Rodríguez Bilella, P. & Tapella, E. (Eds.), *Evaluation, democracy and transformation. Experiences of participatory evaluation in Latin America*. Vientosur.

Participatory evaluation of government interventions in Mexico is a recent practice, no more than 5 years old. The institutionalisation of evaluation in the country, at the federal and subnational levels, has standardised the terms of reference of traditional evaluations with no participation of the stakeholders involved in the interventions. In 2020, the Government of the State of Zacatecas made a disruptive move by incorporating into its Annual Evaluation Programme the participatory evaluations of 3 public interventions: these were not budgetary programmes (to which evaluations are usually applied), but rather a strategy for gender equality, a project for the social prevention of violence, and a component of a programme that receives resources transferred by the federal government.

This chapter has been structured to first outline the context of the institutionalisation of evaluation in Mexico at the federal and subnational levels, and to attempt to convey how subnational governments — particularly the states— have greater potential for innovation than the federal government in matters of evaluation, owing to the regulatory framework governing them and the political plurality within which they operate.

It is important for the reader to be aware of the pandemic context in which the evaluations were carried out and the constraints that had to be faced in implementing them. Even with these limitations,

the results of the evaluations proved valuable for the interventions. The recommendations, which can be consulted in the evaluation reports, were enriched by the experience of those who collected data in the field, those who implemented the interventions and those who analysed the systematised primary data. This wealth of opinions, knowledge and practical lessons cannot be achieved in traditional evaluations conducted by an external evaluation team working solely with desk-based research and documentary evidence.

Finally, the lessons learned from implementing these evaluations —such as the analysis of the challenges faced and how they were resolved— are useful tools for anyone wishing to implement a participatory evaluation of government programmes.

The context of evaluation in Mexico

In Mexico, since the late twentieth century, evaluations have been carried out on programmes and public policies whose operating rules mandated their evaluation. However, it was not until the emergence of the National Council for the Evaluation of Social Development Policy (CONEVAL) in 2004, the enactment of the *Federal Budget and Fiscal Responsibility Act (LFPRH)* in 2006, the publication of the *General Guidelines for the Evaluation of Federal Public Administration*

Programmes in 2007 and the constitutional reforms of 2008 that the regulatory framework was established for the implementation of the Performance Evaluation System (SED) at the federal level (CONEVAL, 2016).

This was replicated at the state and municipal levels, prompting subnational governments to move towards models of results-oriented public administration. In compliance with federal regulations, the Ministry of Finance and Public Credit (SHCP) draws up each year a Diagnostic Report on progress in implementing the Results-based Budget (PbR)-SED in the federal entities and municipalities⁴¹, and, since 2012, CONEVAL has produced the Diagnostic Report on progress in monitoring and evaluation in federal entities⁴²; these instruments have resulted in some states and municipalities developing and strengthening their evaluation systems (CONEVAL, n.d.).

Zacatecas: a state at the forefront

For its part, the Mexican state of Zacatecas established the State Evaluation System as an inter-institutional mechanism to promote the external evaluation of public policies, programmes or development initiatives driven by the State Government. In 2018 the *General Evaluation Plan* was approved, whose objective was to link evaluations to the priority public policies derived

from the *State Development Plan* then in force. Each year, the State Evaluation Council, (hereinafter “the Council”), which is the decision-making body for evaluation in the state, determines the programmes to be evaluated and the type of evaluations to be carried out on the basis of the aforementioned General Evaluation Plan. One of the criteria for selecting interventions to be evaluated is that they have *operating rules* (ROP) and that they are a priority for achieving the objectives of state policies (Consejo Estatal de Evaluación, 2018).

Strictly speaking, no methodology for the design of evaluations was developed within the state, since, for the commissioning of external evaluations, the *Terms of Reference (TOR)* developed by CONEVAL and the SHCP were adapted, both for state programmes and for those carried out with federal resources. This led to evaluations having little or no participation from the people who run the programmes, and to the complete absence of participation from other stakeholders related to the programme. The participation of the people responsible for the planning, implementation, operation or monitoring of the programme in the evaluations was limited only to the submission of the requested documents and, on rare occasions, to taking part in interviews. Even in the implementation of the recommendations derived from the evaluations through the mechanism of *Areas for Improvement (ASM)*⁴³, participation was passive and limited. This

⁴¹ See <https://www.transparenciapresupuestaria.gob.mx/Entidades-Federativas>

⁴² See https://www.coneval.org.mx/coordinacion/entidades/paginas/indice_diagnosticos_temp.aspx

⁴³ Commitments assumed by the agencies or entities of the Federal Public Administration (APF) based on recommendations or findings from external evaluations, with the aim of implementing improvement processes within programmes (CONEVAL, n.d.).

meant that the results of the evaluations were biased by the vision and opinion of those who designed and conducted them, without taking into account the point of view of those who participate in the processes of generating and delivering the goods and services that the interventions produce, or of those who receive them, except on occasions when there was some kind of assessment of the latter's satisfaction.

In 2020, the Annual Evaluation Programme (PAE) of the state of Zacatecas incorporated 3 participatory evaluations of state public interventions that contributed to the policy of equality and social wellbeing. Not only was the participatory methodology itself an innovation, but it was also a major change to move from evaluating programmes to including evaluations of a strategy, the component of a programme, and a project that forms part of a programme, since traditionally in the country, at both the federal and subnational levels, evaluation is carried out on public programmes (Gob. Edo. Zac., 2020).

The interventions evaluated

Each of the 3 interventions selected to be evaluated under a participatory methodology had had some kind of participation from other stakeholders during its design or implementation, such as beneficiary communities or civil society organisations, so

participatory evaluation was the next step. Each intervention is detailed below.

The gender perspective in state public policies: the Model for Equality between Men and Women

Although laws had been enacted in the state of Zacatecas since 2008⁴⁴ to promote equality between men and women, and to prevent, address, punish and eradicate violence against women, in 2016 there were still high rates of violence against women. According to data from the 2016 *National Survey on the Dynamics of Household Relationships*, (ENDIREH), 59% of women in Zacatecas had suffered at least one incident of discrimination or emotional, economic, physical or sexual violence over the course of their lives, whether at school, at work, within their families or by their partners (Secretaría de las Mujeres, 2017).

In 2017, the Executive Secretariat of the National System to Prevent, Address, Punish and Eradicate Violence against Women admitted the Request for a Declaration of a Gender Violence Alert against Women

⁴⁴ In 2008 the Act on Equality between Women and Men in the State of Zacatecas was enacted, which promotes women's access to social, economic and cultural rights and the full enjoyment thereof. In 2009 the Act on Women's Access to a Life Free from Violence for the State of Zacatecas was enacted, the purpose of which is to prevent, address, punish and eradicate violence against women in the state, and to establish coordination between the bodies of the state public administration and the municipalities.

(AVGM)⁴⁵ for the state of Zacatecas, filed by various civil society organisations (SEGOB, 2018).

Against this backdrop, one of the responses of the Government of the State to achieve the policy of equality within the State Public Administration was the implementation of the Model for Equality between Women and Men (hereinafter this intervention is referred to as “the Model”), under the responsibility of the Secretariat for Women (SEMujer), which seeks the generation, application, evaluation, monitoring and improvement of public policies with a gender perspective and a human rights based approach. The Model consists of four sections:

The first, concerning the diagnostic assessment, helps to contextualise the inequalities between women and men in the state, which serves as an input for the design of policies or actions deriving from this Model; it fosters knowledge of the regulatory framework that requires the development of such policies. The second corresponds to the requirements that each body of the government of the state of Zacatecas must meet for the formulation, implementation, monitoring and improvement of public policies with a gender perspective. The third and fourth contain the list of international and national regulations on human rights of women, in which a matrix of responsibilities of public entities is established. (C-evalua, 2020, p. 15).

To this end, the following actions were considered:

- the formation of a so-called Equality Committee in each of the agencies and entities of the Government of the State, with people responsible for planning,

⁴⁵ This is the set of emergency government measures to confront and eradicate femicidal violence in a given territory.

operational areas, evaluation and monitoring, who were in charge of implementing the Model’s actions;

- the preparation of a diagnostic assessment of the situation of the gender perspective in the public policies of the government body;
- the definition of an action plan;
- monitoring of the action plan.

The activities included in the action plan include: training on the gender perspective and human rights for the body’s staff, the planning of public policies with a gender perspective, and citizen and interinstitutional audits, among others.

The Model is aimed at state agencies and entities, and its direct recipients are the individuals who take the training courses and are supported in carrying out their duties to incorporate a gender perspective; society as a whole, who visit the offices to carry out administrative procedures, and those who receive the goods and services of public programmes, are the ultimate beneficiaries of the Model.

The Model provides for the creation of Equality Committees within the agencies; these lend a plural character to the implementation of the Model, since they involve staff from each agency and from other government bodies through interinstitutional audits⁴⁶.

⁴⁶ As part of the requirements of the Model, the citizen and interinstitutional audits made it possible to verify the progress of the Model’s implementation through the joint and coordinated participation of the government, civil society organisations and specialised academic bodies.

The Model was one of the three interventions selected to be evaluated with participation due to the participatory nature of its implementation through the Equality Committees, and because of the network of stakeholders that had been created around it within the agencies and entities. In this intervention, it is government bodies that participate as implementers and as direct beneficiaries of the Model.

The community's commitment to the sustainability of its water systems: the Citizen Participation component of PROAGUA

Drinking water coverage in Zacatecas in 2020 stood at 96.1% at the state level (CONAGUA, 2021). However, there are still rural communities that do not have this service. For this reason, the Secretariat of Water and the Environment (SAMA) is responsible for the construction, improvement and expansion of infrastructure in localities of fewer than 2,500 inhabitants, with organised community participation.

The rural section of the Drinking Water, Drainage and Sanitation Programme (PROAGUA)⁴⁷ supports the creation of infrastructure to address the shortfall in the coverage of drinking water, sewerage and basic sanitation services, involving organised community

⁴⁷ A federal programme run by the National Water Commission (CONAGUA). For each state, the federal government enters coordination agreements to provide resources, which are to be used in accordance with the programme's operating rules.

participation in the operation and maintenance of the systems. The social care and community participation component strengthens the organisation of communities for the construction and conservation of the services, with the aim of helping to generate the co-responsibility of the beneficiaries for the future operation, maintenance and efficient administration of the installed system. (SEMARNAT, 2019).

For its implementation in the state of Zacatecas through SAMA, the Citizen Participation component (hereinafter this intervention is referred to as “the Component”) of PROAGUA comprises three phases (SAMA, 2020):

- **Participatory diagnostic assessment.** These are carried out with the participation of 50% of the beneficiary population; community works committees with gender equality are formed. Social feasibility reports for the projects are drawn up.
- **Construction process.** A social oversight committee is formed, to which SAMA presents the project for the works to be carried out, the committee then verifies that the necessary rights of way are in place and that there is legal certainty over the plots of land to be used. During the construction of the project, SAMA provides 80% of the beneficiary population with training on sanitary matters and water culture, as well as on the operation, maintenance and administration of the hydraulic infrastructure. During this time, community agreements are also established to ensure the permanence and sustainability of the service (fee rates, rights and obligations of the committees, rights and obligations of the beneficiaries, election of the committee for

the sustainability of the service). Upon completion of the construction, they hand over the works and the basic file to the Sustainability Committee.

- **Monitoring.** The sustainability committees prepare an annual maintenance plan against which the operating conditions of the delivered systems are monitored, and SAMA provides technical and social advice following the handover of the works.

This intervention requires the committed participation of the population that receives the drinking water systems, from the diagnostic stage through to their operation. During the time in which the water systems are built, the programme implementers work directly with the communities to foster a sense of cohesion and awareness regarding the commitment they take on for the proper operation of the systems.

There are communities that have developed solid teams for the operation and administration of the drinking water systems, with formal procedures for collecting payments and for the operation and maintenance of the equipment, while others have not achieved a commitment to paying the fees and face difficulties in covering the cost of inputs and services for operation, and rely on state or municipal resources for repairs when the equipment fails, since they do not carry out preventive maintenance.

The direct beneficiaries were the families living in the communities in which the drinking water systems were built; municipal authorities and SAMA staff were also involved.

Strengthening community cohesion: the Strategy for the Social Prevention of Violence and Crime with citizen participation

The Abel Dávila neighbourhood is one of more than 90 urban neighbourhoods in the municipality of Fresnillo. At the time the project was carried out, the neighbourhood had been founded barely 10 years earlier, had around 500 inhabitants, and most of the population was aged between 15 and 29. The main economic activity of the families was in the municipality's mines, which forced the fathers to be absent, with family care falling mainly on the mothers (UNODC et al., 2020).

One characteristic of the neighbourhood was that close to 40% of the dwellings were abandoned, in a state of physical disrepair, with broken windows, covered in graffiti and even without doors. This turned them into points for drug dealing and consumption, as well as targets for unauthorised occupation by third parties.

The *Strategy for the social prevention of violence and crime with citizen participation*, under the responsibility of the Undersecretariat for the Social Prevention of Crime (SSPSD) within Zacatecas Secretariat of Government (SGG), seeks to contribute to the reduction of violence and crime through coordination with the state agencies. One of the actions of the strategy is to foster community development through social prevention campaigns and events aimed at the vulnerable population (C-evalua, 2020).

An intervention in the Abel Dávila neighbourhood in Fresnillo was evaluated (hereinafter the intervention is referred to as “the Project”), an area characterised by high levels of insecurity. It is important to highlight that this project was carried out within the framework of the collaboration agreement between the government of Zacatecas and the United Nations Office on Drugs and Crime (UNODC) in Mexico for the monitoring, evaluation and promotion of the actions that made up the *2017–2021 State Strategy for the Social Prevention of Violence and Crime with Citizen Participation*.

The activities carried out within the framework of this intervention began with the preparation of a participatory diagnostic assessment, the purpose of which was to ascertain citizens’ perceptions regarding the security conditions in their neighbourhood, and how these positively or negatively affect their quality of life and their behaviour. The participation of the population and collective construction from within the community and at the local level were sought, with bottom-up approaches, in which the community identified the most important risk and protective factors to work on. The focus was on building trust among the residents, and on ensuring that they would seek improvements through joint action for the collective benefit (Secretaría de Gobierno, 2019).

As a result of the participatory diagnostic assessment, the following risk factors were identified: alcohol consumption, drug consumption, school dropout rates, low educational level, aggressive and violent behaviour and attitudes among girls and boys, violent play dynamics, teenage pregnancies, single motherhood,

family dynamics with absent father figures, family violence, poverty, the possible presence of organised crime, the presence of gangs, vandalism, the presence of shootings in the neighbourhood, few public spaces for social interaction and the deterioration of those that exist, a lack of street lighting, sexual harassment towards women, a weakened social fabric, and an absent or scarce police presence (UNODC et al., 2020).

Colectivo Tomate was in charge of implementing the project through participatory schemes for local integration, using art and mural painting to reflect the community’s sense of collective peace. This project sought to strengthen community cohesion in order to reduce the incidence of crime, based on the premise that greater interaction and trust among the neighbourhood’s inhabitants leads to a greater sense of belonging, more active participation, and better resolution of local conflicts or problems; this in turn, leads to greater security and common wellbeing.

The activities carried out for the implementation of the project included the following:

- Planning and identifying areas on the ground to carry out the community intervention, and mapping key local stakeholders.
- Engaging with the community to present the project and to identify the families who were willing to take part in the community intervention and commit to the process.
- Raising awareness among the mural artists who would take part in the community intervention process.

- Engaging the community in the process through integration activities with the muralists and collecting narratives about the participating families' collective vision of peace.
- Intervention by the artists on murals with active citizen participation, giving form to the collective vision of peace.
- Inauguration of the project with local authorities, presentation of the murals, and a closing dialogue session with the community.

In this project, the direct beneficiaries were the residents of the neighbourhood, and the stakeholders who took part were Colectivo Tomate, the UNODC and the Undersecretariat for the Social Prevention of Crime of the Zacatecas Secretariat of Government.

The evaluations

The purpose of carrying out the participatory evaluations of three priority public interventions was to obtain a panoramic view of them that would bring together the perspectives of both those who operate them and those who receive their goods and services, and thereby achieve comprehensive improvements to the interventions. In addition, the aim was to develop a culture of evaluation among the people responsible for the interventions and those who receive them. The interventions evaluated were those described in the previous section:

- the Model for Equality between Women and Men (the Model);
- the Citizen Participation component (the Component) of the Drinking Water, Drainage and Sanitation Programme; and
- the Strategy for the Social Prevention of Violence and Crime with citizen participation (the Project), in the Abel Dávila neighbourhood.

The same methodology was followed for the three interventions, the training sessions were delivered jointly, and some of the members of the evaluation teams took part in two evaluations.

The participatory evaluations carried out in the state of Zacatecas had the following characteristics:

- **Selection of the participating parties:** owing to the point during the pandemic at which the participatory evaluations were carried out, it was not possible to open participation up to the full range of stakeholders; however, in each of them there was diverse representation: (1) in the evaluation of the Model, the evaluation team included staff responsible for its implementation and people from the agencies that were direct recipients of the Model; (2) in the evaluation of the Project, the staff from the implementing body took part only in the design stage, while staff from the citizen oversight committee took part in conducting the evaluation; (3) in the evaluation of the Component, staff in charge of implementation and social oversight staff participated in the implementation, the latter also took part in the monitoring stage.

● **Control of the evaluation process:** the decision to carry out the participatory evaluations was taken by the Council together with the heads of the agencies responsible for the interventions. The stage of selecting and contracting the facilitation team for the participatory evaluations was the responsibility of the Council. The selection of the people who would make up the evaluation teams was carried out jointly by the Council, the agencies responsible for the interventions and the facilitation team for the participatory evaluations. The facilitation team for the participatory evaluations was in charge of training the evaluation teams and coordinating their activities throughout the evaluations. It was the evaluation teams who made the decisions about the evaluation process.

● **Depth of participation:** the evaluation teams received intensive training throughout the evaluation process, and were responsible for: (1) designing of the evaluation, defining the objective, evaluation criteria, evaluation questions and data-collection methods; (2) the implementation of the evaluation: the development of the instruments for collecting data in the field, conducting interviews, surveys and direct observation, and carrying out systematisation and analysis; (3) drafting the evaluation reports and the slides for their presentation; (4) presenting the evaluation results before the Council and the heads of the agencies responsible for the interventions.

Methodological approach for the participatory evaluations in Zacatecas

The participatory evaluations were carried out at a time of uncertainty due to the onset of the Covid19 pandemic, so it was decided that they should be implemented remotely, using technological resources and with face-to-face activities kept to a minimum, which made the involvement of beneficiaries of the interventions hardly feasible.

The Council invited consultancy firms to submit proposals for the implementation of the evaluations. The firm selected was the Centre for Programme Analysis and Project Evaluation (C-evalua) which, aware of the context of restrictions on in-person activities and the difficulty of incorporating beneficiaries from the population, proposed an evaluation that could be carried out through online tools, with the use of virtual platforms, remote sessions via streaming, and the greatest possible use of technological tools.

Objective of the participatory evaluation proposed by C-evalua

The aim was to establish a team of individuals involved in the intervention and, with the guidance and support of an external facilitation team, to identify those aspects of the intervention that were of interest to the evaluation team for making the necessary improvements to the intervention.

A key aspect of the evaluation proposal presented by the selected facilitation team was the development of skills and capacities in evaluation to be worked on with the people who would make up the evaluation teams.

Among the main expected results of these evaluation exercises were (C-evalua, 2020):

- ownership of the intervention on the part of the implementing body and of those who were users or recipients of the intervention's products;
- the development of skills —such as the capacity to reflect, to analyse and to propose solutions— among the people taking part in the evaluation teams;
- learning and improvement processes for the intervention and for future interventions;
- accountability.

With this objective in mind and based on the expected outcomes of applying the participatory methodology, the three evaluations were carried out under the facilitation of the C-evalua team.

It is worth noting that the Council granted the facilitation team trust and freedom in conducting the evaluations, with ongoing monitoring through internal coordination meetings between the facilitation team for the evaluations and the Secretariat of Public Administration (*SFP*). The aim of the meetings was to learn about the progress, challenges and difficulties faced during implementation and to help find solutions that would guarantee the continuity and conclusion of the evaluations.

Stages of the methodology

The facilitation team proposed a methodology of 3 stages which, added to the one that had already been started by the Council within the Government of the State of Zacatecas, gave a total of 4 stages.

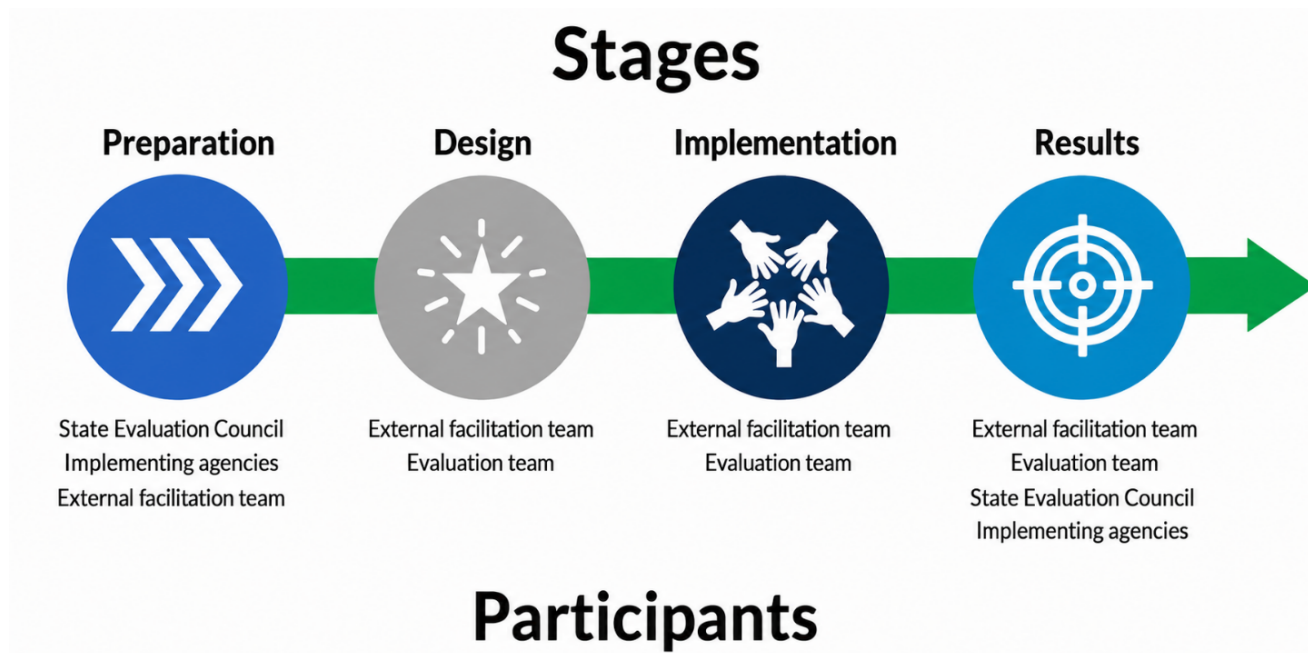


Figure 1. Stages of the methodology implemented for the participatory evaluations in Zacatecas.
 Source: Own elaboration based on the methodology employed by C-evalua in 2020.

The following section describes the stages of the methodology, while also describing the development of the evaluation and the lessons learned.

Development of the evaluation

There was a period of 8 months from the start, in March 2020, with the evaluation preparation stage, to the presentation of results in December 2020, a period that was divided into the 4 stages described below.

Stage I: Preparation of the evaluation

How does one come to recognise the need to incorporate participatory approaches into evaluations? The Council included visionary individuals who had taken an interest in seeking new horizons in evaluation and bringing them to Zacatecas in order to deepen the results of evaluations. People such as José de Jesús Flores⁴⁸ and Claudio Pérez⁴⁹,

⁴⁸ Director of Planning at the Zacatecas State Planning Council.

⁴⁹ Evaluation Unit at the Secretariat of Public Administration.

who followed the activities of the evaluation networks of Mexico (ACEVAL) and Latin America (ReLAC), as well as of EvalParticipativa, and who had taken part in conferences, seminars and the occasional participatory evaluation workshop, presented to the Council the existence of this type of evaluation in other countries, pointing out the importance of implementing it in those interventions that, from their design, had the participation of different actors.

In a session of the Council⁵⁰, it was decided that participatory evaluations would be implemented for 3 public interventions, owing to the need to develop a culture of evaluation among the people responsible for the programmes and their beneficiaries, and it was considered that the application of participatory methodologies would contribute to a better understanding of the programmes and would raise awareness of the importance of improving them with a more comprehensive vision.

Since this took place at the onset of the Covid19 pandemic, at a time of uncertainty about its evolution and the repercussions it would have for the implementation of the evaluations, as well as for the availability of budgetary resources —because dealing with the health crisis took priority— it was not until July that the appropriateness of carrying them out was assessed, when better conditions for doing so already

existed⁵¹.

The Council reached agreements with the 3 secretariats responsible for the interventions in order to explain the participatory methodology, which was an innovation within the Government of the State. Among the main points of agreement were granting permission to the staff who would take part in the evaluation teams to devote themselves to the tasks entrusted to them, and not attempting to interfere in the results of the evaluations.

Once the institutional arrangements for carrying out the participatory evaluations had been made, the Council invited proposals from evaluation consultancy firms that had previously carried out evaluations in Zacatecas, and that could demonstrate experience and/or professional training for this type of methodology.

Each firm had a presentation meeting with the members of the Council and the heads of the selected interventions, in which they explained the methodology to be followed, the activities to be carried out at each of its stages, the teaching resources to be used, the degree of participation and involvement of the people who would make up the evaluation teams, the schedule of activities, and the expected results. The Council and the agencies responsible for the interventions deliberated in order to select the consultancy firm that

⁵⁰ At the First Virtual Ordinary Session of the State Evaluation Council on 26 March 2020 the Annual Evaluation Programme was approved and, with it, the 3 participatory evaluations (Coordinación Estatal de Planeación, 2020).

⁵¹ At the First Virtual Extraordinary Session of the State Evaluation Council on 16 July 2020, it was agreed that the Secretariat of Public Administration would coordinate the participatory evaluations with external advice and with the participation of the Directorate of Social Oversight (Coordinación Estatal de Planeación, 2020).

would be in charge of conducting the 3 participatory evaluations.

What responsibilities did the facilitation team have?

C-evalua, the facilitation team for the participatory evaluation, was involved in the process from this first stage of evaluation preparation, with the following functions:

● **Preparation of the work plan for the design and implementation of the participatory evaluation.**

This required gathering secondary and primary information through initial interviews with the people responsible for the interventions, in order to obtain information about them and to ascertain the specific interest of the agencies regarding the evaluations. These activities allowed the facilitation team to immerse themselves in the interventions for the design of the work plan and a strategy for the selection of the people who would make up the evaluation teams.

● **Selection of the people who would make up the evaluation teams.** The Council, the agencies and the facilitation team selected the people who would take part as members of the evaluation teams. The ideal profile for participants was:

- knowledge of the programme;
- awareness of the sociocultural characteristics of the programme's beneficiary population;
- experience in fieldwork and in the use of data-collection tools;
- experience in the use of remote communication media;

- time availability to take part in training, coordination meetings and the collection and systematisation of information;
- experience in collaborative work;
- a willingness to learn.

Since it was difficult for everyone to cover the entire profile, priority was given to the participation of those who met the greatest number of requirements, with availability of time to participate being a key factor. Each agency was responsible for informing the selected people about their participation in the evaluation teams; this task was not assigned to the facilitation team, but was carried out by the agencies, and not in all cases did the participants receive clear information about their involvement. Indeed, some people were not even consulted about their availability to participate, which caused some delays or low involvement in the teams. All the teams initially had between 8 and 10 members; one team ended with 5.

It was with the formation of the evaluation teams and the approval of the schedule of activities that the evaluation preparation stage concluded, and the evaluation design stage began.

Stage II: Design of the evaluation

What responsibilities did the facilitation team have? The role of the external facilitation team at this stage consisted of:

● **Developing the necessary competencies and skills within the evaluation teams to design the evaluation.** Online workshops were held in which they were first provided with theoretical elements of evaluation, which were subsequently applied to the design of the evaluation of the interventions. The training was carried out in the form of workshops, involving the three teams, conducted synchronously and online. The practical application was carried out individually with each evaluation team, synchronously. In general terms, the three teams followed the same schedule; however, each team progressed at different rates.

● **Facilitating the development of the evaluation design.** Throughout this stage, individual and tailored attention was given to each evaluation team, as a form of support, to help them resolve doubts and to motivate them to make progress in the evaluation; they were instilled confidence in what they were doing, and priority was placed on fostering team spirit.

What activities were carried out at this stage? Once the three evaluation teams had been formed, they received training on the intervention and on evaluation topics, so that they would have the information needed to take part in the evaluation. The training was delivered in the form of workshops and was initially envisaged as virtual sessions on non-consecutive days, so that the teams could meet in between to discuss the activities and tasks assigned to them.

The workshops had two parts: a theoretical part and a practical part. Since not all team members the teams

had full knowledge of the interventions⁵², and only some of them had had prior training in evaluation topics, it was necessary for the workshops to deliver the theoretical fundamentals of evaluation and immersion activities in the interventions.

The theoretical part addressed fundamental definitions of evaluation: *the objective, the evaluation questions, the data-collection techniques and the sources to be consulted*. The practical part was developed in parallel with the theoretical one so that, at the end of these workshops, the design of the 3 evaluations would be in place. The facilitation team for the workshops, made up of 3 people, would support each of the evaluation teams in the practical activities.

The workshops were carried out remotely, using the Zoom platform for the online broadcasts, tools such as Jamboard, Google Drive and Google Forms for the activities, and WhatsApp groups were created for the communication of each team. For the development of the practical phase of the workshops, work was carried out in small groups using Zoom's Breakout Rooms tool.

The workshops covered the following topics:

● **Defining the objective of the evaluation.** Although the areas responsible for the interventions had previously been consulted about their specific interests in the objective of the evaluation, the objective of each evaluation was developed with the teams, incorporating wherever possible the

⁵² The staff of the Directorate of Social Oversight had limited knowledge of the interventions to be evaluated.

objectives previously expressed by the areas responsible for the interventions. The role of the facilitator in each team was to provide support in reaching a consensus on the objective of each evaluation. In this first activity, it was necessary to explain how the online collaborative-work platforms worked.

● **Defining the evaluation criteria and questions.**

The theoretical part covered the evaluation criteria of the Organisation for Economic Co-operation and Development (OECD) and the types and use of evaluation questions. In the practical phase, the evaluation teams defined the criteria they would use in line with the objective they had already defined, and subsequently the evaluation questions. The role of the facilitators was fundamental in conducting the activities, supporting the teams in the use of the technological tools, and guiding them through to the definition of the questions. However, the facilitators did not intervene in the decision over the evaluation questions, although they did provide support for the clarity of the wording and the scope of each question.

● **Defining evaluation indicators.** The theoretical part addressed explanations and examples of indicators; in the practical phase, the teams were supported in defining their indicators. The role of the facilitator was fundamental in clearing up doubts

and in enabling the teams to define appropriate indicators. The teams were encouraged to meet on the days when there were no virtual workshop sessions, in order to catch up on the practical work and to continue without delays; the facilitation team was available to take part in those meetings or to answer questions through remote means.

● **Defining the data-collection methods and identifying the information sources.** In the design stage, theoretical training was provided on data-collection methods and on how to identify information sources; it was not until the implementation phase that the instruments they would use were designed. The practical phase for the design consisted only in identifying the type of data-collection instrument they would use and in an approximation of the sources they would consult.

This information was concentrated in the Evaluation Matrices of each team.

The techniques used were the following:

- They introduced themselves using an icebreaker technique.
- Brainstorming on the Jamboard platform.
- Drawing up the evaluation matrix in Google Docs, using cards that could be moved, added or deleted.
- Conversations through the Zoom platform.

We would like your colleague to introduce you!
Let's work in pairs: you have 5 minutes
to introduce yourselves and talk about the following topics:



Name



Institution and
role



Academic
background



Programme you are
interested in evaluating

We'll return to the general room, where each person
will have one minute to introduce their colleague.
Let's go!

Figure 2. Example of the use of remote tools for the workshops.

Source: C-evalua, 2020.

What limitations did the facilitation team and the evaluation teams face at this stage? The first limitation was that the workshops could not be carried out in person; this delayed the integration of the teams and somewhat reduced the participants' gains. A large proportion of the members of the evaluation teams had limited access to computer equipment, since they

were working from home with their own resources; this constrained the facilitation team, who had to use few online tools and ones that could be used from mobile phones. Other situations that limited the performance of the teams were: connection problems, work activities that prevented attendance, and family circumstances.

Even so, the training was very valuable in enabling the evaluation teams to acquire the knowledge and competencies needed to design the evaluation in a participatory way.

Stage III: Implementation of the evaluation

The core part of an evaluation is its implementation. This stage is when the evaluation team gathers the information to answer the evaluation questions that have been posed.

What role did the facilitation team have?

Among other things, to motivate and empower the participants. At this stage, the facilitators provided training and support to the teams for the collection, systematisation and analysis of the information. The facilitation team worked remotely through the Zoom platform and WhatsApp groups, on an individual basis with each evaluation team.

This stage was crucial for the evaluation. The teams had to collect information; some people had never conducted an interview, so they were trained in a practical way and instilled the confidence to go out into the field. As facilitators, it fell to us to motivate and to make it happen: a stage in which we were spectators of the first results of the training offered to the teams. It was extremely gratifying to hear the satisfaction of the people who conducted not just one but eight interviews in their first experience; it was fascinating to witness how, little by little, their perception evolved regarding the problem addressed by the intervention

and the situation of the populations in relation to the problem and the programme; it was very enriching to see firsthand the effects of the participation of the people involved in the evaluation.

At this stage, the integration of the teams was achieved, and so too was the departure of some people from these teams, with the collection of information and interaction.

What activities were carried out at this stage? The three evaluation teams began this stage with their evaluation matrices completed and reviewed by the facilitation team. The implementation schedule allotted 6 weeks to this stage, for the following activities:

- **Preparation:** during virtual sessions, the facilitators supported and guided the evaluation teams in carrying out the following activities during the first week of the implementation period:
 - *Design of instruments for collecting data in the field.* Training and support were provided in the preparation of interview guides, survey questionnaires, direct-observation guides, informed-consent forms, lists of stakeholders and people to interview, and the size of the sample to survey.
 - *Piloting of the instruments* during the training and support sessions.
 - *Logistical preparation for fieldwork.* The evaluation teams were responsible for requesting appointments or permissions to visit the localities to carry out the surveys and interviews, securing transport resources, ensuring that they had the equipment and instruments needed

to record the interviews, ensuring there were enough printed copies of the surveys to cover the sample, and so on. The role of the facilitation team was to give them support and to resolve doubts about the activities.

● **Data collection:** over the following three weeks, the teams for each of the evaluations carried out different data-collection activities, as can be seen in the following table:

Activities	Model for Equality between Women and Men	Strategy for Social Prevention of Violence and Crime in the Abel Dávila Neighbourhood	The Citizen Participation component of PROAGUA
Desk review	Yes	No	No
Fieldwork: Virtual interviews	Yes	Yes	No
Fieldwork: Face-to-face interviews	No	Yes	Yes
Fieldwork: Online surveys	Yes	No	No
Fieldwork: Face-to-face surveys	Yes	Yes	Yes
Fieldwork: Semi-structured observation	No	Yes	No

Table 1. Data-collection activities carried out by the evaluation teams.
Source: Own elaboration with information from C-evalua, 2020.

Owing to the health conditions and the restrictions on group gatherings imposed in response to the Covid19 pandemic, the data-collection activities were carried out both in person and online. While the use of information and communication technologies (ICTs) offers relative advantages in terms of saving

time, travel expenses and online systematisation, at a significantly lower cost than carrying out the fieldwork in person, their main disadvantages are that they represent a barrier to effective contact with people—above all those who are not familiar with these technologies— and that these barriers limit the depth

of the interaction and can sometimes bias the results. Other challenges are also found: a lack of internet coverage in some regions and a lack of equipment with the technological requirements to sustain video conferences, among others.

In the cases where it was possible to coordinate the in-person collection of information, the teams took precautions for travel and for the care of the people being interviewed. In the collection of primary information, the teams were organised so that the people from the areas responsible for the interventions would not take part in these activities, and instead it was people from the Directorate of Social Oversight, and from other agencies (in the case of the Model), who were in charge of conducting the interviews, surveys and direct observation.

Among the challenges faced were failing to locate the people to be interviewed; having to reschedule the visit to the Abel Dávila neighbourhood due to a criminal incident that had occurred days before the visit; and having to make arrangements with the Secretariat of Public Administration because some people from the agencies did not agree to grant interviews to the evaluation team, since they expected the facilitation team to accompany them, among others.

● **Processing of the information.** Once collected, it was necessary to organise, classify and systematise it. For this, support was requested from other areas of the agencies that form part of the Council, since the agencies responsible for the interventions would not take part. Because of the limited time

for the evaluation, these activities were carried out at the same time as the evaluation teams were collecting the information. Field-data processing matrices were used. The role of the facilitation team consisted of training the people who would process the information and conducting random checks of the audio recordings and the records in the matrices in order to validate the consistency of the information.

● **Analysis of the information: conclusions and recommendations.** In the fifth week of the implementation period, daily virtual meetings were held with the evaluation teams for the analysis of the information collected in the field. Drawing on the knowledge of the programme, the information collected and the systematisation carried out, collaborative activities were undertaken using Google tools in order to generate the main findings that would answer the evaluation questions. It is important to note that the number of participants in the teams had decreased: some people had not obtained permission to go into the field to carry out surveys, interviews and direct observation, and decided not to continue in the process. On the basis of the analysis of the findings, the evaluation teams drew up conclusions and recommendations. The role of the facilitation team was to train them in the stages of the evaluation and to moderate the working sessions in which the conclusions and recommendations were generated.

Stage IV: Results of the evaluation

What was the role of the facilitation team? To guide the teams in presenting the results, and to empower them to present before the heads of their agencies with the certainty that they knew all the information because they had generated and analysed it, as well as defining the findings and recommendations. The facilitation team carried out group-integration activities, recognised the work done by the teams, was readily available to support them with any doubts and questions they had, and practised active listening and empathy.

What activities were carried out? Once the evaluation had concluded, the *Evaluation Results Report* was compiled. The facilitation team designed a document to set out the results and separate set of slides for presenting them. Both were developed collaboratively:

- The team responsible for the intervention was tasked with developing the section corresponding to the description of the intervention.
- The facilitation team was in charge of developing the methodological chapter.
- The rest of the evaluation team was responsible for incorporating the findings, conclusions and recommendations of each evaluation into the documents.

The presentation of results to the State Evaluation Council and the heads of the agencies responsible for the interventions was carried out following the same order and distribution of tasks.

Feedback

At the end of the presentation of results, participants were asked how they felt after having taken part in the evaluation teams: the great majority of the responses were of joy and satisfaction, acknowledging that they had learned a great deal.

Under state regulations, the dissemination of the results and the implementation of improvements fall within the remit of the Secretariat of Public Administration, so the scope of the evaluations did not cover those activities.

Model of the participatory evaluations of 3 public interventions in Zacatecas

The methodology developed by the facilitation team in coordinating the three participatory evaluations is summarised in the following diagram.

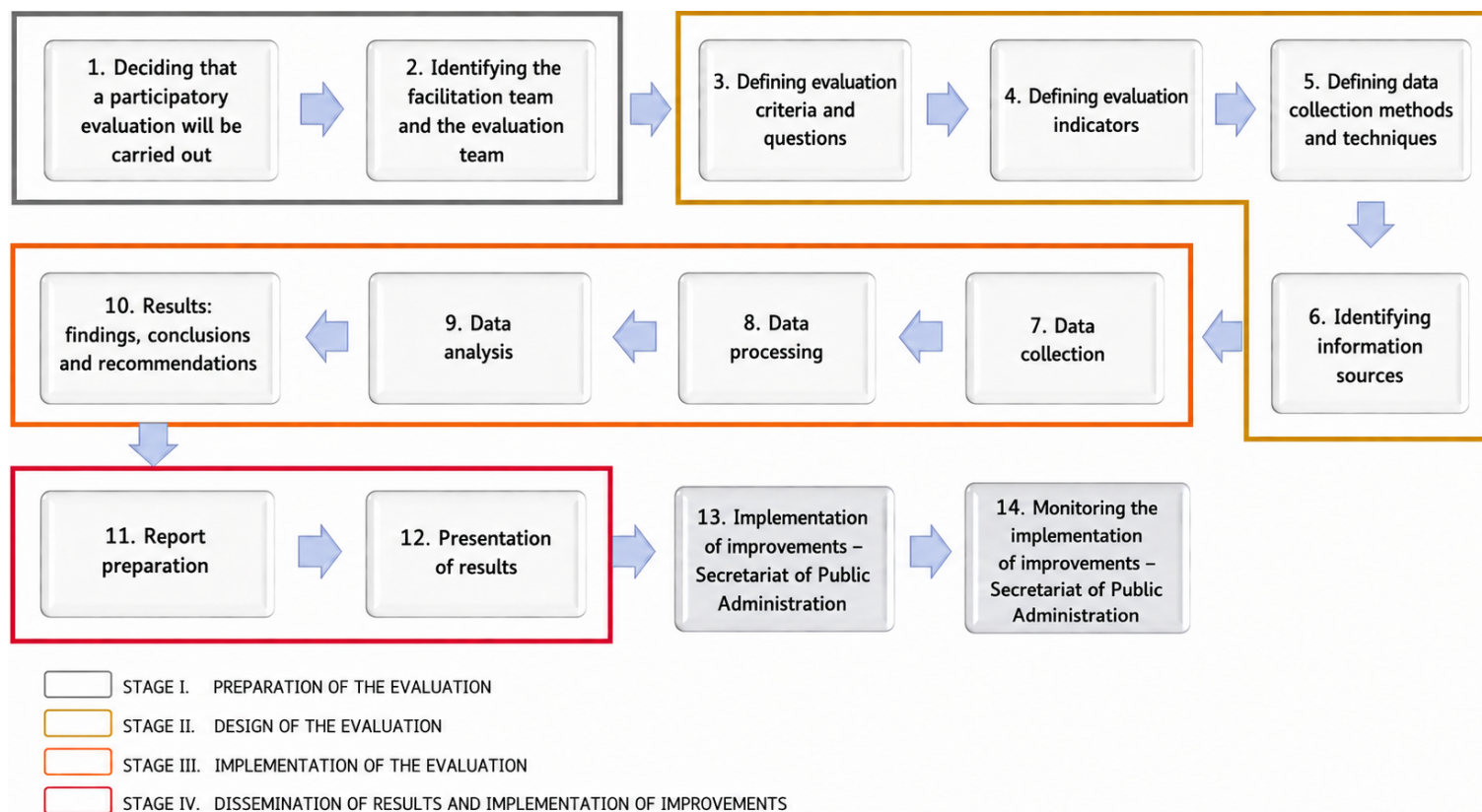


Figure 3. *Participatory evaluation model implemented in Zacatecas, 2020.*

Source: Adaptation of the model presented in the reports of the participatory evaluations, C-evalua, 2020.

Reflection on the experience

The evaluations of the 3 public interventions of the State of Zacatecas were the first experiences of participatory evaluation of public interventions recorded in Mexico. We now know that, at the same time, the state of Jalisco began a process of evaluation with participation of the programme ***Mi pasaje***, aimed at “students, people with disabilities and older adults”, which was concluded and published only in 2021; consequently, there were no references available for consultation when the evaluations in Zacatecas were carried out.

The greatest merit that can be considered for this exercise is that, in more than one sense, it broke the *status quo* of programme evaluation in Mexico. On the one hand, it was innovative by using a hybrid participatory methodology, between a *practical participatory evaluation*⁵³ and a *transformative participatory evaluation*⁵⁴; and, on the other hand, by conducting evaluations of interventions such as a crosscutting Model, a Project and the Component of a programme instead of taking a budgetary programme as the unit to be evaluated.

Carrying out these evaluations during the onset of the pandemic introduced high levels of uncertainty and

limited the in-person activities and the participation of the beneficiary population of the interventions. However, despite these limitations, the results of the evaluation exercise—in terms of lessons learned, the development of competencies among those who took part in the evaluation teams, the ownership of the process and result of the evaluations, and the very richness of the findings, conclusions and recommendations derived from the evaluation—were superior to what would have been obtained in a traditional evaluation.

The coordination of the evaluation by an external facilitation team guaranteed the rigorous application of methodologies for the design of the evaluation, the collection of information and its analysis, as well as the inclusion at each stage of the opinions and experiences of the members of the evaluation teams. At the end of the evaluations, a robust survey was administered to the people who took part in the evaluation teams, which documented the experience from their perspectives, and which has served to record the perception of the process held by those who made up the evaluation teams.

At some forums where this evaluation experience has been presented, questions have been raised about the internal nature of the evaluation, since, in two of the three evaluations, there was no participation of the beneficiary population. The involvement of the Directorate of Social Oversight in supporting the evaluation in two teams, and of the agencies participating in the Citizen Audit processes in the third team, broke with the endogenous character

⁵³ It seeks a concrete utility within the intervention being evaluated: in Zacatecas it was characterised by the participation, for the most part, of the people implementing the interventions.

⁵⁴ It seeks collective empowerment and the deepening of social knowledge; this was present throughout the evaluation process.

of the evaluations, as did the fact that the collection of information was carried out by people external to the programme. In this regard, a factor that is often overlooked in these criticisms is the Council's willingness to open up an evaluation process to the participation of other people from the state; even though what is desirable for a *transformative participatory evaluation* is that those who receive the goods, services and benefits of the intervention should be the ones who conduct the evaluation. In 2020, in Zacatecas, inviting other areas of government to take part in the evaluation teams was something disruptive and aligned with the characteristics of a *practical participatory evaluation*.

The following sections detail the main challenges and difficulties faced, as well as the main lessons learned from this experience for other evaluation exercises; some of these have already been mentioned throughout the document.

Challenges arising from the context and the environment in which the evaluations were developed

This section covers the situations external to the interventions and the coordination of the evaluations that affected their conduct. For each case, the measures taken to resolve them are outlined.

Virtual working and “social distancing”

Owing to the limitations on travelling, holding in-person meetings and bringing people together in enclosed spaces, it was necessary to resort to technology to carry out a large part of the evaluation activities. This represented great challenges in terms of technology, attention and the use of teaching resources, and it reduced the learning and enthusiasm of the participants.

The facilitation team was flexible with those people who were unable to connect, and also progressively eliminated the activities that involved the use of platforms, retaining only the minimum online collaborative activities. In some cases, individual sessions were held with those who had connection problems, in order to ensure a consistent basis across the evaluations.

Health problems among members of the evaluation team

Some people caught Covid19 and were absent from activities for days or weeks. This situation delayed progress slightly; nevertheless, through team effort, work continued while the others rejoined. When requested, the facilitation team held individual sessions with those who had been absent due to COVID, in order to bring them up to date and to ensure a consistent basis across the evaluations.

Risk of infection

This applies mainly to the people who carried out data-collection activities, or those who had to go to their offices to be on duty. In-person activities were limited as much as possible in order to avoid risks of infection during the evaluation.

Difficulty in obtaining all of the documentary evidence from the authorities

This challenge was faced mainly in the evaluation of the Model, which included several activities of rigorous documentary review: keeping some offices closed, or else rotating staff attendance to maintain social distancing among those present, were some of the measures implemented within the Government of the State because of the pandemic. This made it difficult for the agencies selected in the sample to send the evaluation team all of the requested documents. The evaluation team itself, familiar with the Model's processes, requested from SEMUJER the documents that were missing and that the agencies in which the Model had been implemented could not provide.

Insecurity in the intervention's study area

This challenge was faced in the evaluation of the Project, since there are high crime rates in the Abel Dávila neighbourhood. In the days prior to carrying out the fieldwork, there was an incident that led to

the temporary suspension of data collection: the area was guarded by state police personnel, and it was necessary to wait at least two weeks for calm to return to the neighbourhood in order to carry out the fieldwork.

To ensure the safety of the members of the evaluation team in charge of carrying out the fieldwork, the direct support of the Undersecretariat for the Social Prevention of Crime was requested so that it would intervene and request the support of the neighbourhood networks that had been created through the intervention, in order to enable the team carry out the information collection. The number of interviews conducted was lower than planned, but given the circumstances, the sample size had to be reduced.

Within the evaluation team

The nervousness of those who would be presenting the results of their work publicly for the first time; pressure arising from the expectations of the people responsible for the programmes regarding the results of the evaluations.

Institutional challenges

Those inherent to the institutions, their regulatory framework and their organisational aspects, which affected the performance of the evaluation teams.

Implementation timeframes

The timeframe for carrying out the evaluations was a scant 3 months, which had to be allocated to the training for the evaluation design; the preparation and conduct of the fieldwork, its systematisation and analysis; and the drafting of the final report and the slides for presenting the results.

One of the most frequently mentioned suggestions for improvement in the survey carried out is that more time should be allocated to each activity: to the training (which would allow for a greater benefit from the knowledge gained), to carrying out the fieldwork and to systematisation and analysis (which would allow the members of the evaluation teams to engage more deeply with the results of the evaluations), and to preparing for the final presentation.

From other experiences of participatory evaluations of public programmes that have been published in other states (Evalua Jalisco, 2024), it has been observed that the processes have taken over a year to complete. The facilitation team tried to be as flexible as possible with the timings; however, there was an established date for the delivery of the final evaluation reports that could not be moved.

Technological challenges

Not everyone had the technological resources needed to carry out collaborative activities, and some people who did have them were not familiar with the use of

interactive platforms. This posed a challenge for the facilitation team and for the working teams, since it caused delays or misunderstandings in communication, resulting in lower efficiency of the work.

The facilitation team trained the members of the evaluation teams so that they could use the communication and remote-working tools on the devices they had available (whether phones or computers), and the activities were adapted so that some people who could not connect to Zoom could participate via telephone call.

Pressure from senior management regarding the results of the evaluation

Traditionally, in the state, numerical indicators have been used to reflect evaluation results; for this reason, some senior management figures in the evaluated agencies were keen for their scores to be high—that is, for them to “come out well in the evaluations”—. This meant that the staff of the implementing areas who took part in the evaluation teams rejected the findings that reflected opportunities for improvement, or requested the opportunity to make corrections in the programme’s implementation so that they would not be included in the evaluation report.

Upon becoming aware of these situations, the facilitation team talked with the implementing staff to remind them of the nature of the evaluation: to seek lessons and areas for improvement in the interventions.

Low level of commitment among some members of the evaluation teams

Some people were not consulted about their interest in participating, instead they were added to the evaluation teams on instructions from their hierarchical superiors. This situation caused low levels of performance and commitment in their teams.

Another factor that influenced the level of participation and involvement was that the evaluation was an additional task to the everyday work they carried out, since their workloads were not reduced so that they could take part in the evaluation.

The role of the facilitation team was also to motivate and foster the commitment of the participants. When a person was absent, they were contacted to find out, first of all, whether they were in good health, and then to invite them to resume the evaluation activities.

Lessons learned

The survey administered at the end of the evaluations has been a valuable instrument for extracting lessons and suggestions for improvement from the people who took part in the evaluations. The lessons are summarised below.

On the organisation of the evaluations

- It is essential that the people who join the evaluation teams be informed of the scope of their participation and the level of commitment and dedication required before inviting them to participate.
- People must give their consent to joining the teams. The forced participation of people has repercussions for their involvement, performance and the result of the evaluation.
- The information provided to them should be comprehensive, clear, using simple language and presented openly; the nature of the evaluation should be explained at length, since many of these people have not previously taken part in an exercise of this kind and may feel apprehensive about getting involved. When they are invited, their questions about their participation should be listened to and answered, and they should be asked about their expectations. The forced participation of people has repercussions for their involvement, performance and the result of the evaluation.
- For greater dedication and commitment to the evaluation, it is important that those who make up the evaluation teams have the time to carry out the activities—in other words, that the other functions inherent to their post be reduced during the implementation period—.
- When deciding to implement a participatory evaluation, it is important to quantify the cost of acquiring the basic equipment (audio recorders, cameras, etc.).

On the implementation of the evaluations

- Training has a greater impact in terms of benefitting from the knowledge imparted if it is carried out in person and with more time, so as to avoid overloading the participants with information.
- Incorporating activities to raise participants' awareness of the importance of the evaluation and to strengthen their commitment will enrich the collaborative work.
- People contribute more if they are given the opportunity to express themselves and to share their knowledge and experience about the programme and about the sociocultural context of the environment in which the programme is implemented. This is the richness of participation in the evaluation.
- The role of the facilitation team in providing support during the stages of the evaluation is valuable as it builds confidence and fosters the participants' commitment.
- The role of the facilitation team is also to motivate and empower the evaluation team.
- Training serves to develop capacities in the people who take part in the evaluation teams and in the institutions in which they work. Comments expressed in the survey point to the acquisition of competencies in terms of the use of tools for remote collaborative work, the design and application of tools for the collection of primary information, and its systematisation and analysis.

- The workshops should be longer in order to make better use of the content; efforts should be made to raise awareness and foster commitment among the participants so that they engage with the activities and further enrich the collaborative work; they should also be held in person so that they are more dynamic, and it is advisable to provide more examples before moving on to the practical part.
- It is important to recognise the efforts of the evaluation teams, since this motivates them and helps them value the evaluation experience more highly.
- More time should be dedicated to training during the implementation of the evaluation; bearing in mind that the participants have no prior training in evaluation or research. More time should also be given to systematisation and analysis since, being the first time that many of the participants have carried this out, they require more time to do so. The people who reached this stage within the teams were more motivated than at the start of the evaluation.

On the results of the evaluations

- One of the greatest achievements of the participatory evaluations in Zacatecas was the ownership of the interventions and of the evaluation process that was attained within the evaluation teams.
- It is essential to raise the awareness of the heads of the implementing areas and of those who take part

in the evaluation teams so that they accept findings, conclusions and recommendations without resistance.

- The results of the evaluations were relevant to the improvement of the programmes.
- The people who took part in the teams now know the benefits of evaluations.

The future of participatory evaluations of public programmes in Mexico

- An increasing number of federal entities are interested in implementing participatory evaluations of their government programmes, and there are more and more evaluators seeking to acquire the training to carry them out. There is a training programme in participatory evaluation promoted by the Government of the State of Jalisco.
- It is important to continue strengthening the practice of participatory evaluations, because of the great benefits they bring to public interventions, to the development of institutional capacities and to the strengthening of the culture of evaluation.

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