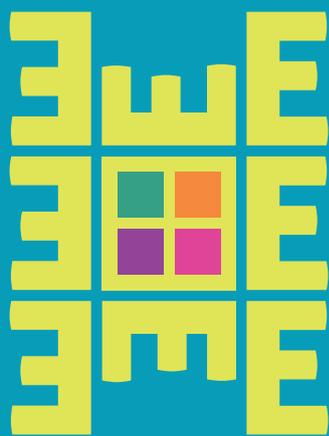


EVALUATION STANDARDS

FOR LATIN AMERICA AND THE CARIBBEAN

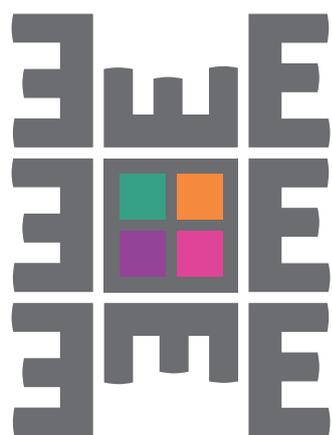


EDITION 2021
RELAC STANDARDS WORKING GROUP



EVALUATION STANDARDS

FOR LATIN AMERICA
AND THE CARIBBEAN



EDITION / 2021

RELAC STANDARDS WORKING GROUP

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AUTHORS:

Evaluation Standards working group for Latin America and the Caribbean

Ana Luisa Guzmán

<https://orcid.org/0000-0002-3083-6760>

Fabiola Amariles /

<https://orcid.org/0000-0002-9183-1904>

Andrea Peroni

<https://orcid.org/0000-0003-0584-7705>

Luis Soberón

<https://orcid.org/0000-0002-6890-153X>

Andrea Wehrle Martínez

<https://orcid.org/0000-0001-7545-7871>

Marcia Itzel Checa Gtz.

<https://orcid.org/0000-0002-4226-0893>

Celeste Ghiano

<https://orcid.org/0000-0002-4432-6956>

Sergio Martinic

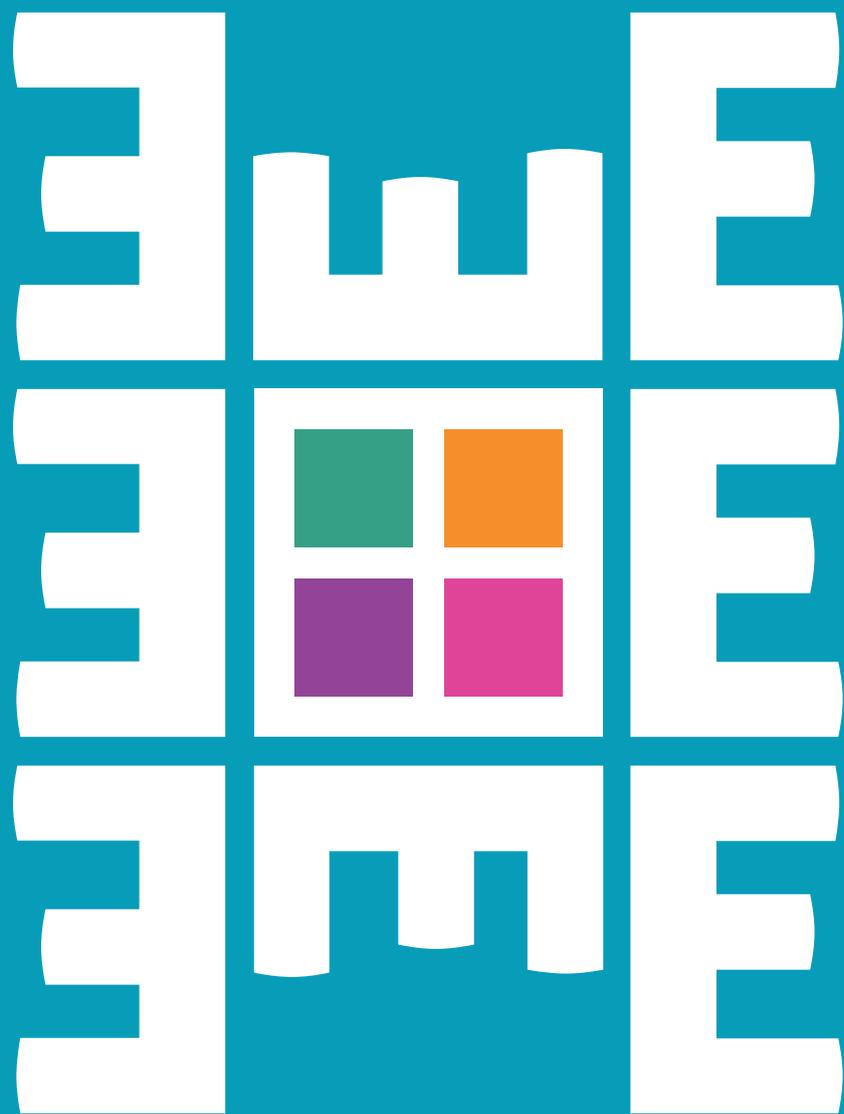
<https://orcid.org/0000-0003-2587-2414>

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CONTENTS

A.	ABBREVIATIONS AND ACRONYMS	Page. 7
B.	INTRODUCTION	Page. 8
C.	CONCEPTS, APPROACHES AND GUIDING PRINCIPLES	Page. 11
D.	POLITICAL, CULTURAL, ECONOMIC AND SOCIAL CONTEXT OF LATIN AMERICA AND THE CARIBBEAN	Page. 17
E.	NEW PERSPECTIVE FROM AND FOR EVALUATION	Page. 22
F.	EVALUATION STANDARDS FOR LATIN AMERICA AND THE CARIBBEAN	Page. 24
G.	REFERENCES	Page. 50

A.

ABBREVIATIONS AND ACRONYMS

7

AWID: Association for Women's Rights in Development

CEDAW: United Nations Committee on the Elimination of Discrimination against Women

CELADE: Latin American and Caribbean Demographic Centre (abbreviation from Spanish initials)

CELADEL: Latin American Centre for Local Studies (abbreviation from Spanish initials)

COVID: Coronavirus disease

DAC: Development Assistance Committee

DEval: German Institute for Development Evaluation

ECLAC: Economic Commission for Latin America and the Caribbean

FILAC: Fund for the Development of the Indigenous Peoples of Latin America and the Caribbean

FOCEVAL/FOCELAC: Programme to Strengthen Evaluation Capacities in Latin America

IFAD: International Fund for Agricultural Development IHRL: International Human Rights Law

IOCE: International Organization for Cooperation in Evaluation

LGBTIQ+: Lesbian, Gay, Bisexual, Transgender, Intersex, Queer and other genders

MIDEPLAN: Costa Rican Ministry of Planning

OECD: The Organisation for Economic Co-operation and Development

PREVAL: Regional Platform for Evaluation Capacity Building in Latin America and the Caribbean (abbreviation from Spanish initials)

ReLAC: Latin American and Caribbean Network for Monitoring, Evaluation and Systematization (abbreviation from Spanish initials)

SDGs: Sustainable Development Goals

UNEG: United Nations Evaluation Group

UNDP: United Nations Development Programme

UNICEF: United Nations International Children's Emergency Fund

B.

INTRODUCTION

8

The first version of the *Evaluation Standards for Latin America and the Caribbean* was created by the Latin American and Caribbean Network for Monitoring, Evaluation and Systematization (ReLAC) Evaluation Standards working group¹ and was published digitally and in print in 2016.

In light of the breath-taking pace of changes in our societies and the evolution of evaluation studies and practices, we believe it would be beneficial to review our standards and assess how useful they are, ensuring they are adaptable to new needs and contexts.

The work carried out in 2016 was foundational as it established a technical profile for evaluations for the first time. The instrument, created by our evaluator community, is particularly useful for those who carry out evaluations in contexts

1. Group comprised of Ana Luisa Guzmán, Esteban Tapella, Luis Soberón, Pablo Rodríguez-Bilella, Sarah Klier and Sergio Martinic.

specific to our region. The work was based on an extensive review of standards, principles and criteria formulated by evaluation associations from various regions and countries and international cooperation organizations. Likewise, contributions were made by evaluators who responded to a consultation instrument created for this purpose and a workshop with specialists. The final format was also enriched with reactions received in several international meetings.

This reviewed and approved edition has also been drafted by the ReLAC Standards working group². For this second version, an extensive consultation and dialogue process was carried out with participants from several national networks that comprise the ReLAC and other interested colleagues during the second half of 2019. A workshop

2. Comprised of Ana Luisa Guzmán, Andrea Peroni Fiscarelli, Andrea Wehrle Martínez, Celeste Ghiano, Fabiola Amariles, Marcia Itzel Checa Gutiérrez, Luis Soberón and Sergio Martinic.

was also run in Costa Rica³ that addressed the Standards' potential, use and implementation. Contributions from this consultation were systematised in the first term of 2020 and used as inputs for the work carried out by the group when drafting this document.

Substantial research, updating and dialogue with regard to the results from the regional consultation was carried out from June 2020 to March 2021.

Another part of this process included a validation moment with key regional stakeholders in an online workshop run in May 2021, during which suggestions were gathered and possible uses for this document/tool were discussed.

The Evaluation Standards initiative was created and framed within the ReLAC strategic lines. This network began in 2003 during the first IOCE (International Organization for Cooperation in Evaluation) meeting, held in Lima in March of the same year. Under the impetus of three national networks (Colombia, Peru and Brazil)

3. Organised by the Evaluation Standards working group for Latin America and the Caribbean together with the EvalCR and ACEVAL networks on 14-15 November 2019, with the support of the FOCELAC-DEval programme.

and PREVAL (Regional Platform for Evaluation Capacity Building in Latin America and the Caribbean), interest was generated and evaluation networks were formed in other countries in the region with the support of international agencies such as UNICEF and IFAD.

In October 2004, the first ReLAC conference was held and representatives from twenty countries from the region participated. In this conference, the institutional declaration, mission, objectives, principles and values were shared. Eighteen years later, ReLAC is stronger than ever, comprised of fifteen national networks and new statutes and regulations that enable us to expand our horizons to form a bigger, more united, stronger and more inclusive network. This document incorporates the new statutes approved in December 2020⁴.

The Standards working group, together with other thematic groups, is part of ReLAC's organic structure and carries out its work on a voluntary basis (*ad-honorem*). Its work focuses on the production, research, updating and dissemination of this guiding framework for the region.

4. <https://www.relac.net/wp-content/uploads/2021/01/201219-Estatutos-ReLAC-1.pdf>

As the Standards are instruments for strengthening evaluation capacities, they benefit from financial support from the German Institute for Development Evaluation (DEval), through its FOCEVAL, FOCELAC and FOCELAC+ projects, led by the Institute in collaboration with the Costa Rican Ministry of Planning (MIDEPLAN)⁵. Without this

5. FOCEVAL (Programme to Strengthen Evaluation Capacities in Costa Rica and other Latin American

support, the graphic design, audiovisuals, translation, printing, consultation workshops for both versions of the Standards and participation in dissemination events would not have been possible.

countries) was a regional project that concluded in December 2020. Building on this experience, the line of cooperation was continued and expanded with the FOCELAC (Evaluation Capacity Building and Networking in Latin America) project, which is currently in force with the addition of new proposals, since 2021, as FOCELAC+.

C.

CONCEPTS, APPROACHES AND GUIDING PRINCIPLES

As was the case with the previous version, this revised and approved edition of the Evaluation Standards document for Latin America and the Caribbean, offers a set of guidelines so that high-quality evaluations are achieved that assist decision making for development intervention measures. These guidelines act as basic references for the whole evaluative process; they influence its design and ensure it is implemented and reported in context. It thus aims to contribute to improving quality of life and stimulating virtuous development dynamics that are useful for both accountability and learning.

This edition intends to contextualise evaluation to a greater extent with a focus on new demands and challenges in the region and taking into consideration the diversity that exists within countries and their cultures. The result is a more detailed specification of evaluation dimensions and standards.

When reviewing and preparing this new document, an interpretation framework was constructed that comprises an interrelated set of *concepts* (broadly agreed definitions), *approaches* (cross-sectoral perspectives to be heeded) and *principles* (shared values, beliefs and norms in the discipline) that help guide the way the *standards* (guidelines for action) are interpreted and make sense of how they are to be applied in practice. The next section will describe these concepts, approaches and principles.

CONCEPTS

The concepts were drafted so that objects or elements that are central to the process of applying standards could be more precisely defined. These are: *intervention, development, evaluation, quality and professional competence*.

The word **intervention** refers to the 'object of evaluation', expressed in collective actions aimed at tackling a public issue (including policies, programmes and projects, and taking into consideration strategies and theories of change). The intervention is understood within its environment, context and the multi-agent system where it operates.

The concept of **development** that we emphasize in this document is linked to human development. This goes beyond the idea of economic growth to think about the environment that is needed so that people and population groups can develop their potential and thus lead dignified lives according to their needs and interests. In this comprehensive framework, we reflect on *Vivir Bien (Living Well)*, *Buen Vivir (Good Living)* or *Vida en Plenitud (Life in Fullness)*¹ as an alternative to viewing development in purely economic terms where progress implies the well-being of all humanity, in harmony with its surroundings and environment. (UNDP, 1992; Huanacuni Mamani, 2010; Escobar,

1. The terms used in Spanish and English to describe the *suma qamaña* (aymara) or *sumak kawsay* (quechua) are **vivir bien (living well)**, used in Bolivia, and **buen vivir (good living)**, used in Ecuador. However, the magnitude of the concept is lost in the translations. A more exact suggestion could be the translation **Vida en Plenitud (Life in Fullness)**. (Huanacuni M, 2010, p 13)

2014; 2030 Agenda – SDGs, 2016; Bautista, 2017; Choquehuanca; 2020)

We understand **evaluation** as a systematic process of reviewing, inquiry and analysis that can take place at different moments of the intervention cycle, with the aim of assessing its merit or value, its design, its processes, achievements, effects, impacts and lessons. (UNEG, 2016; UNDP, 2019; OECD-DAC, 2021)

In general, we consider that the **quality** of an evaluation refers to the extent that the process and product respond to the expectations, interests, needs, proposals and rights of the intervention's target stakeholders within a framework of social, economic, political, cultural and environmental sustainability, and taking into account methodological rigour, professional ethics, cultural understanding and relevance.

In practice, evaluation requires a high level of **professional competence** to respond to requirements that arise in evaluative processes and contexts that are usually complex and involve multiple diverse actors. In other words, it means that these professionals need to have the knowledge, skills and attitudes to be able to carry out their

roles efficiently and to a high standard with a deep understanding of the context.

Professionals who take on evaluations should ask themselves to what extent they fulfil the required profile to carry it out. They should acknowledge their own value scales and the implications these have with regard to the intervention's particular context and situation.

Furthermore, those who request the evaluation should be able to identify the skills profile required to carry out the evaluation in line with its purposes, recognising which standards are most applicable to the intervention and situation under evaluation.

APPROACHES

Development interventions aim to stimulate changes to the quality of life of people, groups and collectives. Given that our realities reveal significant imbalances in social structures and relationships, this new version of the standards seeks to make these inequalities visible through these approaches: *human rights, gender and interculturality*.

The **human rights** approach aims to create an alert so that evaluations reveal how these rights are affected and how they can be promoted in the intervention's context and domain as well as in the evaluation process itself. When applying this approach, International Human Rights Law (IHRL) is of central importance². The rights are enforceable and when they are recognised, differences should be integrated and imbalances corrected. Applying this approach to evaluation means putting people at the centre of all activity and observing if duty-bearers ensure and guarantee these rights in the intervention.

The **gender** approach implies recognising how gender is constructed and how gender categories and relationships are reproduced in the intervention context and in the evaluation itself. It is necessary to both make

2. International Human Rights Law sets out the rules and principles agreed by the international community and international standards have been derived from it so that human rights are respected, protected and guaranteed. This includes: declarations (such as the Universal Declaration of Human Rights), covenants (such as the International Covenant on Civil and Political Rights, or the Covenant on Economic, Social and Cultural Rights), conventions (on a specific right or people group, for example, the CEDAW), protocols (that derive from the covenants), general observations, special reports, resolutions and judgements from organisations in the matter and case-law, both in the global system (United Nations) and in regional systems (inter-American in our case).

this visible and subsequently help overcome the inequalities and existing gaps and generate conditions that guarantee equality and an inclusive and participatory process (ECLAC-UN Women, 2020; CEDAW, 1979). This therefore means implementing an *intersectional* analysis as a tool for interpreting inequalities that emerge as identities converge (AWID, 2004). This approach emphasizes the extent to which gender and power relationships give place to inequalities, subordination and discrimination and how intervention strategies and evaluation processes change (or not) these relationships.

The **interculturality** approach encourages links and exchanges between cultures in equal terms and conditions based on ongoing relationship, communication and learning between different people, groups, knowledge, values, traditions, logic and rationales with the aim of generating, constructing and fostering mutual respect, and a holistic development of individual and collective capacities that go beyond cultural and social differences. By applying this perspective to evaluative processes, the intention is to break with the hegemonic history of one culture being dominant over others and it thus strengthens identi-

ties that have been traditionally excluded so that a respectful and legitimate form of *co-existing* can be constructed among all groups in society. (UNESCO, 2005; Virtual Library of Indigenous Peoples, 2010)

PRINCIPLES

Given the importance of evaluations and the consequences that can result from them, the standards should be applied and the evaluation carried out in a way that is guided by certain principles that direct evaluator actions. In this regard, we consider the following principles to be essential: *professional ethics and integrity, equality, transparency, inclusion and transformation of reality*. Together, they guarantee that actions are carried out responsibly.

Evaluations should be guided by **professional ethics and integrity** that put people and their human rights at the centre, whether dealing with individuals or collectives. One aspect of professional ethics implies revealing (rather than hiding or minimising) inequalities or shortcomings in the social context and another aspect relates to taking into consideration specific ethical criteria that are unique to the field or area of

work, applying the corresponding national and international regulations. Consent and confidentiality are central attributes of this principle.

Equality means generating conditions so that all people and groups involved can participate in the processes equally, that their rights are guaranteed and that they are considered active subjects. These conditions are created when people are valued irrespective of hierarchy, social, economic and/or cultural factors, their gender identity, sexual orientation, age or cultural origin, thus contributing to equality and not discrimination. Evaluators should adopt a holistic, participatory and inclusive viewpoint 'leaving no one behind'. They should tailor their work to the particular communities involved in the evaluation process, encouraging them to participate and freely share their analyses and opinions so they can be considered in the evaluation. Their participation should be integrated into the whole process, right from the evaluation design through to the monitoring of final report recommendations.

To ensure **transparency**, evaluation activities should be supported by an explicit legal agreement regarding the evaluation

scope, duration, cost, anticipated products, intellectual and material property rights, publication rights, and the safeguarding of reserved and confidential information from data produced. Under the principle of transparency, the evaluation documents should meet the high-quality standards of public documents and be freely accessible, particularly the terms of reference, evaluator team selection criteria and results reports.

The principle of **inclusion** means that diverse social and cultural interests and representations have to be taken into account in a participatory and democratic manner. Special attention is required for Latin American and Caribbean groups and communities that are deeply connected to ways of being in the world (*ser y estar en el mundo*) that have historically been rooted in contexts of cultural exclusion and diversity. Their participation is fundamental so that their perspectives, requests and concerns are made explicit and so that ownership of the evaluation results is achieved.

The principle of **transforming the reality** means that evaluations have to remember that the interventions under evaluation are carried out with the purpose of changing realities and closing gaps that exist in the

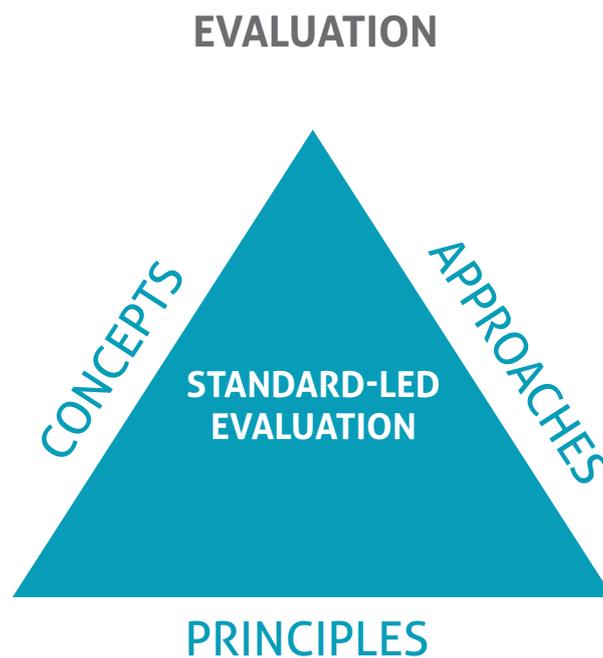
region in terms of living conditions, inequality, exclusion and poverty. Evaluations have the end goal of transforming society (and they make explicit if the intervention is contributing to transforming realities or not), constructing a fairer society and reducing social gaps, adhering to the 2030 Agenda.

region bring together the four main principles adhered to by ReLAC: *transparency, democracy, inclusion and networking*, in a synergy of ideas from evaluative processes and evaluation institutionalisation.

The next image is a visual representation of an evaluation carried out in line with standards, bringing together the main concepts, approaches and principles described.

16

The prior section outlining the approaches and principles that guide evaluation in the



D. POLITICAL, ECONOMIC AND SOCIAL CONTEXT OF LATIN AMERICA AND THE CARIBBEAN

DIVERSITY AND UNITY

The countries of Latin America and the Caribbean are diverse in terms of their geographies, socio-political systems, cultural realities and their peoples' identities. Despite this, the region has a shared history that enables its nations to see themselves as members of a shared culture and identity.

The struggles for independence, guided by values of freedom and autonomy, shaped a shared ideal and, at the same time, formed the region's borders and countries as they are known today. The shared history includes the domination over indigenous peoples by conquerors who sustained colonial society. From this time on, several indigenous people movements have raised their

voices and used their strength to fight for their cultures to be recognised and their ways of being to be honoured. Over the course of time, national cultures were also constructed with the arrival of immigrants mainly from Europe, Asia and Africa who had heard about our continent's wealth and potential. The countries' histories tell of the points of contact and divergence between people with different backgrounds, races, customs and cultures which contributes to the diversity that characterises us today.

But, in addition to the rich diversity that exists, the region is also home to multiple inequalities, several of which have colonial origins. In fact, ever since their independences, and throughout the period of nation-state construction, Latin American and Caribbean countries have been characteri-

sed by severe internal gaps in their levels of development, resulting in major contrasts in the region's reality.

THE NEO-LIBERAL REFORMS

18

Over the last thirty years, Latin America and the Caribbean have been transformed by policies inspired by the Washington Consensus (1989). This international agency and banking initiative promoted neo-liberal reforms aimed at reducing the influence and functions of the state in society and strengthening markets by giving them maximum levels of freedom. The resulting policies promoted a reduced state in terms of its functions and areas of action and, in several countries, implemented administrative decentralisation and private service provision, particularly in the fields of education and health. (Kliksberg, 2005)

In this period, the economic approach centred around studying the cost and benefit of policies, focusing expenditure and ensuring its efficiency, and introducing new public management ideas in states that aimed to modernise and improve public administration efficiency and effectiveness. Reform-

ms were introduced in practically all Latin American countries that, in general, adopted ideas and practices from policy management and evaluation using a managerial perspective.

INEQUALITIES IN THE REGION

Despite these reforms, the region's countries have not resolved their internal inequalities. As a whole, the region continues to be one of the most unequal in the world, with a Gini coefficient of 46.2¹. Moreover, in many cases, the very same reforms that were implemented have even exacerbated the inequalities.

Beyond the differences of income can be found cultural, social and political inequalities that symbolically rank their populations in hierarchies and perpetuate different power relationships. This reality can be observed, for example, in gender inequalities, in the situation of indigenous peoples and in the problems associated to migration movements, mainly forced, that exacerbate problems of discrimination within our countries.

<https://datos.bancomundial.org/indicador/SI.POV.GINI>. Consulted on 30 March 2021 (data from 2020)

Gender inequalities continue to be a structural trait of the region and are decisive in macroeconomic, productive, institutional and socio-cultural domains. Patriarchal culture perpetuates an economic structure that does not create conditions that are favourable for women to achieve autonomy and overcome the gender gap in the labour market. Despite advances, the rate of labour participation among women in Latin America remains at around 50% while that of men is at 74.4%. In other words, half of the region's women are not linked to the labour market. (ECLAC- UN Women, 2020)

Women are also discriminated against in our countries socially and politically. Historically, the contribution and leadership of women has not been recognised and in today's political life, few women have gained seats in parliaments or obtained positions of responsibility in governments.

Likewise, while some progress has been made, there is still work to be done in the region in terms of LGBTIQ+ rights. Overcoming gender inequalities requires deep cultural shifts in the region's countries where there is still significant evidence of patriarchal culture in social relationships and hierarchies of power.

Furthermore, indigenous people continue to experience exclusion and discrimination that was generated in the conquest and colonial era. It is estimated that there are 60 million indigenous people in Latin America, equating to 10% of the region's population, from more than 800 different ethnicities. This group continues to suffer from higher levels of poverty and wage inequalities between indigenous and non-indigenous workers intensify according to level of schooling and gender (ECLAC-FILAC, 2020). For this reason, one of the most significant challenges facing the region's countries is the construction of institutionally pluricultural, diverse, inclusive, equal and non-discriminatory societies in which the rights of indigenous people are effectively recognised and guaranteed.

Finally, it is important to not lose sight of the migratory movements of the last few decades within the region: return migration, irregular migration, forced people movements and asylum requests, temporary migration, skilled worker migration, remittance flows and the presence of diaspora groups in host countries (CELADE, 2012). This is a transnational phenomenon that is starting to attract state-led action, with no clear resolution on the matter.

CHALLENGES FOR THE XXI CENTURY

20

Latin American and Caribbean states face new challenges as well as older ones and ones that have become more severe through the health crisis that began in 2020.

One of these older challenges still to be resolved is the need to overcome a growth model that is centred around extracting and exporting raw materials with little or no added value.

Another task that remains is the continued need to develop democracy. In most of the region's countries, both politics and the main public institutions have lost legitimacy in society. Furthermore, the elites have known how to conserve and renew their power and most of the population do not participate and instead remain excluded from the benefits of development and growth. These results reveal the limits of the *Washington Consensus* paradigm and modernisation streams of thought in government and public management. These reforms ended up intensifying inequalities, beginning a period of social conflicts and protests that have affected the region's democracies.

Within this historic context and tradition, the impact of the COVID-19 pandemic has created new and urgent challenges for the region. The pandemic has revealed internal inequalities and the limits and inability of the development model and today's institutions to deal with them. A substantial increase in poverty is expected along with economic and political crises and the expectation is that our countries will have great difficulty in developing governance that strengthens democracy and social protection within this framework of uncertainty.

The quality of public policies has been questioned in terms of their capacity to tackle the new and old challenges. Governments with little backing from civil society and reduced states negatively affect their capacity to act and impact policies that have been designed to tackle the problems identified.

The new century has revealed the need for structural changes and for the state to take a leading role in health and social matters. At the same time, this necessitates a substantial change in the way public policies are managed, implemented and evaluated.

In this context, a region that has traditionally been a recipient of benefits is being

transformed into one that is more active, where stronger mechanisms are in place for citizens to express their demands and civil society is more empowered to exert control

and participate in decisions and the implementation of policies aimed at meeting social demands.

E.

NEW PERSPECTIVE FROM AND FOR EVALUATION

22

At present, we are at the beginning of a new generation of reforms that, together with the wealth of our diversity, will transform the way we think and implement the provision of social services through interventions of different scales and magnitudes. The action theory set out in this new cycle gives evaluation and social participation a fundamental role in improving implementation processes and the impact of social policies and interventions.

Within this framework (and in line with the challenges previously identified) evaluation takes on an important role in public reasoning and deliberation, which requires new concepts, methodology and functions to be developed for evaluative work in the region.

Information and knowledge production through evaluation is the surest way of im-

proving the results and impact of public services and the quality of democracy in Latin America and the Caribbean. Evaluations produce knowledge that simultaneously contributes to understanding the social reality, public deliberation and the design of policies that have a greater impact on society and are perceived to be more legitimate.

A new learning-based evaluation culture that is embedded into the whole change process at different levels of the system is required to ensure that these social reforms and interventions are successful.

Today, evaluation adopts new functions that contribute to democratic shifts and quality improvements. This is democratic and transformative evaluation that truly uses evaluation results, recommendations and lessons learned to contribute to the task of

empowering people and communities and their capacity to advocate and transform policies. Thus, evaluation goes from being a managerial philosophy to a new democratic administrative tool that is made available to agencies that implement interventions, participants, beneficiaries of the interventions and society as a whole. (Segone, 1998)

In this context, evaluators must demonstrate a high level of implication and commitment, see themselves as agents of change,

think critically, and be respected in their field of work thanks to the way they perform their role ethically and with rigour and have in-depth knowledge on the issues being studied and the implications of related decisions.

The standards proposed (which act as guidelines for action, regulated by the approaches and principles mentioned) seek to be an instrument to help attain these goals.

F.

EVALUATION STANDARDS FOR LATIN AMERICA AND THE CARIBBEAN

24

As has been previously mentioned, evaluation quality (both the process and the resulting product) should be measured according to the expectations of the entities that have commissioned the evaluation and also to the interests, needs and problems of the communities and groups intrinsic to the intervention. These quality requirements are expressed in agreed terms of reference that specify the purpose of the evaluation, the approaches and methods, the topics that should be included in the report, how the evaluation results will be used and administrative and logistical aspects.

Therefore, both those who request evaluations and those who carry them out should use the standards as a shared framework that can be permanently referred to when communicating and working together right from the start of the evaluation process through to its completion.

The standards have been conceptualised and drafted as interrelated elements that should be applied together in order to ensure that evaluation is carried out to a high standard, taking as a framework the approaches and principles introduced above and with consideration for the Latin American and Caribbean context also described above.

The evaluation standards for Latin America and the Caribbean refer to four dimensions that are essential in high quality evaluations: *Rigour, Ethics and legal principles, Cultural understanding, and Relevance and usefulness*¹.

1. In the first version of the Evaluation standards for Latin America and the Caribbean, the dimension of evaluability was also included. In this revised edition, it is integrated into the dimension of Rigour together with other standards under the name 'evaluability of the intervention'.

En el siguiente cuadro se presenta la composición actual de las dimensiones y estándares respectivos.

4 DIMENSIONS AND 20 QUALITY STANDARDS

1. RIGOUR

- 1.1 EVALUABILITY OF THE INTERVENTION
- 1.2 CONTEXTUALISED EVALUATION
- 1.3 IN-DEPTH UNDERSTANDING OF THE INTERVENTION
- 1.4 RELEVANT AND AGREED EVALUATION QUESTIONS
- 1.5 APPROACHES AND METHODS FULLY EXPLAINED AND JUSTIFIED

2. ETHICS AND LEGAL PRINCIPLES

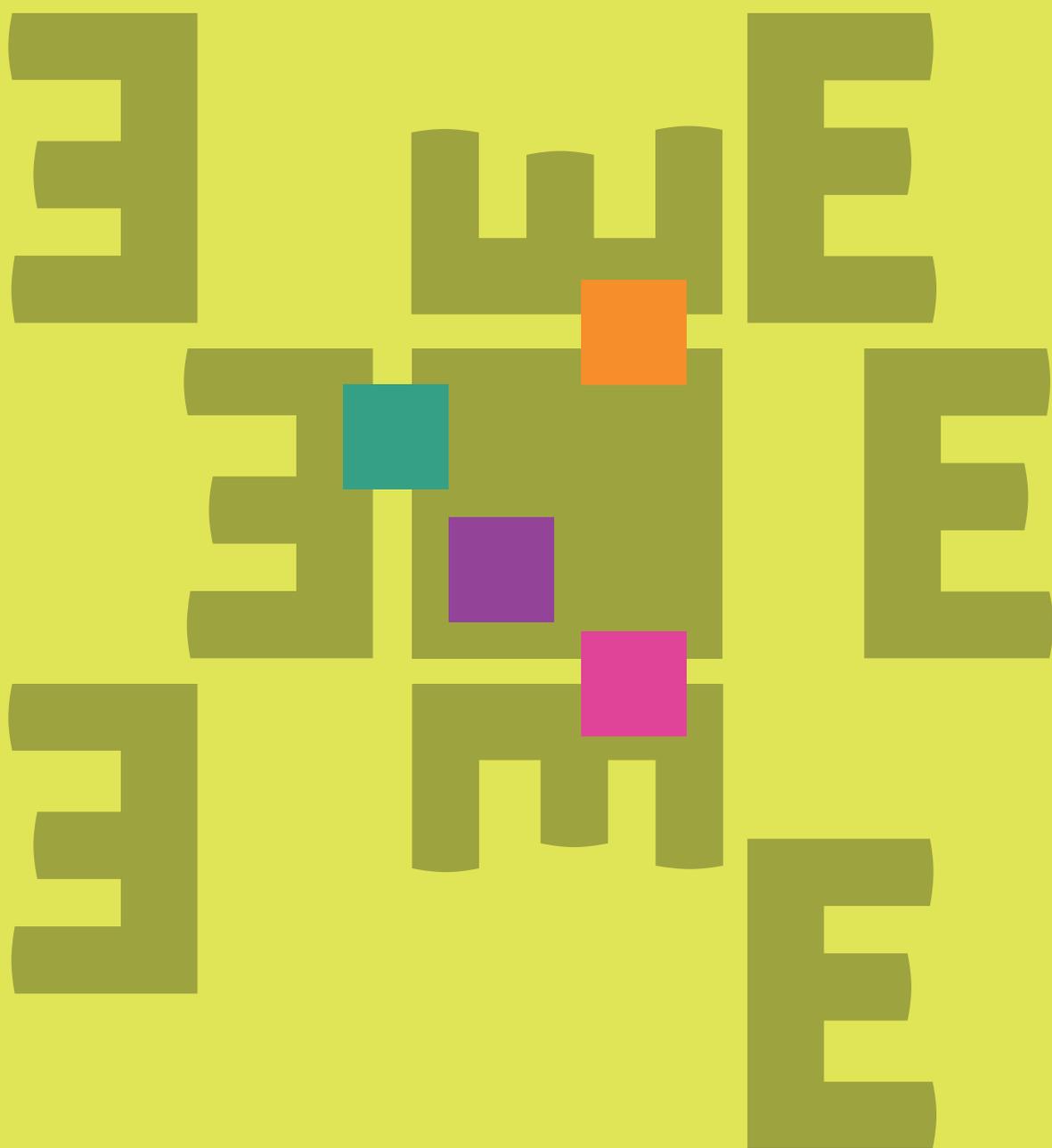
- 2.1 RESPECT FOR PEOPLE'S RIGHTS
- 2.2 TRANSPARENCY
- 2.3 ETHICS AND PROFESSIONAL INTEGRITY
- 2.4 LEGALITY
- 2.5 AUTONOMY

3. CULTURAL UNDERSTANDING

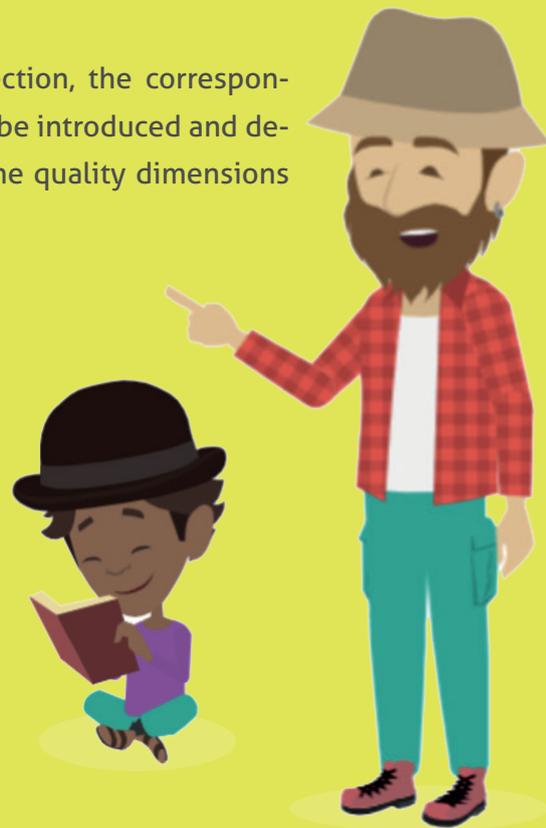
- 3.1 CULTURAL RIGHTS
- 3.2 EQUALITY AND EQUITY
- 3.3 RECIPROCITY AND INTERCULTURALITY

4. RELEVANCE AND USEFULNESS

- 4.1 EFFECTIVE PARTICIPATION
- 4.2 MUTUALLY AGREED PURPOSES
- 4.3 EXPLICIT VALUES
- 4.4 RELEVANT, APPROPRIATE AND TIMELY INFORMATION
- 4.5 USEFUL RESULTS
- 4.6 TIMELY AND APPROPRIATE COMMUNICATION AND REPORTING
- 4.7 INTEREST IN CONSEQUENCES AND IMPACT



In the following section, the corresponding standards will be introduced and detailed for each of the quality dimensions mentioned.



3 2 1
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1. DIMENSION RIGOUR

THE FOLLOWING EVALUATION STANDARDS ARE INCLUDED IN THIS FRAMEWORK.

- EVALUABILITY OF THE INTERVENTION
- CONTEXTUALISED EVALUATION
- IN-DEPTH UNDERSTANDING OF THE INTERVENTION
- RELEVANT AND AGREED EVALUATION QUESTIONS
- APPROACHES AND METHODS PROPERLY EXPLAINED AND JUSTIFIED

An evaluation is rigorous when the intervention and its context, and the interests and needs of target and user communities, groups and populations are all adequately understood. Furthermore, observation and analysis should be based on methodological procedures and systematic assessments so that the evaluation results (conclusions, lessons and recommendations) are properly supported by solid evidence and stakeholders participate in the evaluative process.

Each of these standards will now be described in more detail:

E 1.1 EVALUABILITY OF THE INTERVENTION

Prior to carrying out the evaluation, it must be ensured that the conditions are right for it to be a success. In other words, that timely, significant and trustworthy information can be provided for decision making and for improving the policy, programme or project under evaluation as a result of the evaluation.

Conditions of evaluability include having access to the intervention's documentation and information sources, having the right resources to respond to the evaluation questions and being independent from the evaluation's management, seeking a balance between coverage, evaluation complexity and available resources.

It is necessary to have access to documents that have been produced since the begin-

ning of the intervention with regard to the project design: diagnostics and baseline; description and composition of the project's target groups; general plan and annual operational plans; monitoring and implementation reports; reports from past evaluations; and other relevant documents. Reviewing and analysing the documentation allows us to appreciate if there are clear objectives and a defined strategy for the intervention that details what products are necessary for achieving the objectives. It also reveals how the work relationship has been structured with the target and user groups.

In the evaluation process, it is necessary to interview the different stakeholders involved in the intervention and the service and product target and user groups in particular. When reviewing the evaluability, it is necessary to anticipate if it will be viable to carry out these interviews to the quality and quantity required, while seeking to reduce bias that affect evaluation results.

There should be sufficient resources assigned to the evaluation so that the evaluation activities can be carried out, taking into

consideration the level of detail expected in the question responses, the sample size, the location and dispersion of the group to be interviewed, the interview methodology, information processing and analysis and the time allocated.

One fundamental point is that the evaluator team or person in charge of the evaluation and those requesting the evaluation must agree on clear terms of reference that fulfil professional integrity requirements.

When assessing the evaluability, it is also necessary to consider if in the intervention contexts and those of the evaluation itself, factors could arise to affect and limit the evaluation process and its scopes in terms of objectives, approaches, activities and results.

The overall point of this standard is to assess if it will be possible to evaluate the intervention and offer recommendations that are properly sustained by evidence through evaluative research.

E 1.2 CONTEXTUALISED EVALUATION

Interventions seek to respond to needs and problems suffered by identified and prioritised populations, communities, groups and social sectors which will hereafter be referred to as 'groups'.

The needs and problems of a group are rooted in past and present factors and processes with varying degrees of complexity and structural consolidation. Their specific contexts are situated geographically, forming part of and being linked to larger contexts (regional, national and international).

This means that at the same time as responding to the intervention's description and objectives, it is essential to carry out a detailed analysis of the local context and the stakeholders along with their conditions, demands and perspectives right from the start of the evaluation. It is essential that this attention to the context continues

throughout the evaluation process so that shifts can be observed.

The analysis must cover relevant social, cultural, political and economic aspects; regional, national and international factors that influence the issues and needs that the intervention seeks to address; and factors that can also impact the intervention's strategy and implementation as well as the evaluation itself.

The contextual analysis should provide a broad overview of the target group identifying positions of power, participation and access to resources, taking into account that each person may occupy several positions in the matrix of social categories (*intersectionality*).

Contextualising the intervention under evaluation and the evaluation itself should take into account the impact of these factors.

E 1.3 IN-DEPTH UNDERSTANDING OF THE INTERVENTION

When preparing the evaluation, it is necessary to achieve a sufficiently detailed un-

derstanding of the intervention strategy, purpose, objectives, products and activities. It is also important to understand how all these aspects maintain consistency and are interrelated, affecting each other. In this initial stage of the evaluation, it is important to carry out a critical review of the theory of change that supports the intervention. If this has not been formulated and is not found in the project documentation, it is recommended to create it and make it explicit in documentation produced together with the people in charge of the intervention.

It is necessary to distinguish between the intervention strategy (objectives, results, products) and the way it is organised and implemented, as well as implicit relationship patterns, examining the way they intersect.

The way the intervention is understood should be detailed in a first report, and presented and discussed with the team in charge of the intervention, clarifying doubts, resolving possible interpretation bias and complementing it with relevant missing points. All this will provide a firm foundation for the evaluation design and implementation.

E 1.4 RELEVANT AND AGREED EVALUATION QUESTIONS

The evaluation purposes and questions should be clearly described in sufficient detail and should be easy to understand by the stakeholders involved. They should be agreed and approved in a participatory manner as a way of encouraging the ownership and use of the evaluation contributions by institutions, professional teams and target groups.

It is necessary for the evaluator team or person in charge of the evaluation to contextualise the evaluation questions and relate them to the intervention context, strategy and characteristics in line with that set out in the previous standards.

This standard is strongly related to the standards of participation and inclusion and with those related to the use of the conclusions and recommendations in decision making by stakeholders in the intervention under evaluation; standards which are part of the dimension: *relevance and usefulness*.

E 1.5 APPROACHES AND METHODS PROPERLY EXPLAINED AND JUSTIFIED

The evaluation design includes the creation of a conceptual framework in which concepts, approaches and methods are linked so a coherent and relevant structure is formed to respond to the evaluation questions. This makes it possible to produce valid, trustworthy and relevant data for relevant stakeholders to make decisions.

In the field of evaluation, there are various approaches and methodological preferences. These must be properly explained and justified with regard to the evaluation questions, the context of the intervention and the conditions under which the evaluation is carried out, delimiting its scope. These conditions include policies held by the entities and parties requesting the evaluation and the resources available to the evaluator team.

2.

DIMENSION

ETHICS AND LEGAL PRINCIPLES

THE FOLLOWING EVALUATION STANDARDS ARE INCLUDED IN THIS FRAMEWORK.

- RESPECT FOR PEOPLE'S RIGHTS
- TRANSPARENCY
- ETHICS AND PROFESSIONAL INTEGRITY
- LEGALITY
- AUTONOMY

This dimension ensures that the evaluation process is carried out with due transparency and legality, recognising and respecting the rights of people, communities, populations and institutions involved in the intervention under evaluation and in the evaluation process itself. Within this framework, the people and teams responsible for the evaluation should act with due professional integrity and should be able to act autonomously and independently.

Each of these standards will now be described:

E 2.1 RESPECT FOR PEOPLE'S RIGHTS

36

With regard to information gathering, the evaluation and its procedures should respect the rights of the people involved, both those carrying out the intervention and the target group. It is vitally important to protect their privacy, personal data and right to confidentiality. This means that the evaluator team must display high levels of respect, responsibility and sensitivity to attitudes, beliefs, customs, ways of being and speaking, and respect the personal and social dignity of all involved.

Information and explanations should be given to people explaining for what reasons and purposes information is requested, how it may affect them, and how they will be able to access the evaluation results. All of this should be carried out through a previously established and properly registered protocol of informed consent. Explicit consent should be requested from people if their identity is to be mentioned or image used in the evaluation report or any other form

of communication regarding the evaluation process and results. Likewise, consideration should be given to the way information, learning and results from the evaluative process is fed back to the groups involved.

E 2.2 TRANSPARENCY

The evaluation should be guided, from beginning to end, by the principle of transparency. This implies highlighting and explaining the purposes, criteria, methods and procedures followed, their scopes and limitations. Likewise, the terms of reference and evaluation reports should be made available to interested stakeholders unless there is a justified need for confidentiality. The final evaluation reports should be openly accessible to the public, guaranteeing the principle of full disclosure.

E 2.3 ETHICS AND PROFESSIONAL INTEGRITY

Evaluation should be carried out following the ethical principles of social research, guaranteeing the integrity and rights of all

participants involved (whether as implementers or beneficiaries) in evaluated interventions.

If during the evaluation, a situation is discovered that affects and/or puts at risk the people or groups involved (as a result of the intervention or evaluation), the evaluator team or people in charge of the evaluation should take on the ethical responsibility to inform relevant authorities and institutions of the issue and attempt to find a solution.

E 2.3 AUTONOMY

Evaluation is independent from the intervention's financing and institutional management.

The evaluator team should be fully autonomous when carrying out the evaluation, independent from the entities responsible for financing and implementing the intervention, basing their activity on that agreed in the terms of reference and the agreed contract. The purpose of the evaluation is to assess the merits of the intervention, provide elements for accountability pur-

poses, identify lessons learned and offer recommendations that improve and maximise the potential of the intervention and the sustainability of changes achieved. For this reason, the evaluator team must work autonomously and in a transparent manner, while continuing to coordinate with the intervention implementation organisation when necessary.

E 2.4 LEGALITY

Evaluation activities must be supported by a legal instrument that is signed by all relevant stakeholders. It should make explicit agreements reached on the evaluation scopes, methods, study duration, cost and budget, stakeholder obligations, intellectual and material property rights and publication rights. It should also emphasize that classified information will be safeguarded and data and information gathered will be protected, secured and kept confidential. Any changes that are deemed necessary during the course of the evaluation should be explicitly agreed and integrated through annexes and addendums to the evaluation contract.

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3. DIMENSION CULTURAL UNDERSTANDING

THE FOLLOWING EVALUATION STANDARDS ARE INCLUDED IN THIS FRAMEWORK.

- CULTURAL RIGHTS
- EQUALITY AND EQUITY
- RECIPROCITY AND INTERCULTURALITY

In the evaluation, it is necessary to consider the cultural complexity within populations and contexts where the intervention operates, and the way they relate to inequalities in accessing resources and rights violations. Evaluations should respect the languages, codes and world views of groups that could be affected or benefit from the intervention with a special attention on gender perspectives, intersectionality and interculturality.

The evaluation should be developed with a respectful attitude and a concerted effort to understand the intervention's cultural ecosystem. Evaluation processes should be sensitive to different historical and cultural contexts and they require good levels of communication and empathy in interactions with the people and cultures involved.

Each of these standards will now be described.

E 3.1 CULTURAL RIGHTS

40

Latin America and the Caribbean are characterised by cultural diversity, expressed in linguistic diversity, different forms of community organisation, customs, world views, interculturality and social and economic interconnections.

In these contexts and situations, evaluation should be carried out with an extensive and in-depth knowledge and respect for the identities, values, ways of thinking, concepts and knowledge of people and communities while protecting relationships of trust and reciprocity and avoiding favouring the interest or perspective of one group over another. For the purpose of legitimacy, the evaluation results should be reported and shared. To achieve this, the 'ecology of knowledge' (De Sousa Santos, 2019) and 'popular education' (Freire, 2005) perspectives are highly relevant; both of which originated and were developed in and for the region.

Protocols that refer to cultural rights and identities are essential so that the evaluations produced are based on cultural understanding and are relevant for the community.

E 3.2 EQUALITY AND EQUITY

Unequal power relationships and human rights violations stand out in the region and these should be considered and revealed in evaluative processes, with the aim of avoiding their influence in the evaluation process itself and providing recommendations for how to overcome them. It is necessary to take into consideration and identify situations where two or more factors of discrimination interrelate and affect each other, highlighting and worsening the damage caused to affected people and social groups as occurs in the case of race, ethnicity, class, generation and gender.

Evaluations generate evidence on how interventions seek to lessen existing gaps in the exercise of rights and access to resources; as well as the impact of factors such as

social, economic, political and cultural discrimination.

E 3.3 RECIPROCITY AND INTERCULTURALITY

In most Latin American and Caribbean peoples and ethnic groups, reciprocity and equality in social exchanges and relations-

hips are values that contribute to cooperation, trust and social cohesion (Huanacuni, 2010; Seto, 2016). Evaluations safeguard relationships of trust and reciprocity, avoiding favouring the interest or perspective of one group over another. This means respecting values, ways of thinking, community concepts and knowledge. It also implies the intention to feedback information without affecting internal cohesion and for the purpose of maintaining legitimacy.

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4.

DIMENSION

RELEVANCE AND USEFULNESS

THE FOLLOWING EVALUATION STANDARDS ARE INCLUDED IN THIS FRAMEWORK.

- **EFFECTIVE PARTICIPATION**
- **MUTUALLY AGREED PURPOSES**
- **EXPLICIT VALUES**
- **RELEVANT, APPROPRIATE AND TIMELY INFORMATION**
- **USEFUL RESULTS**
- **TIMELY AND APPROPRIATE COMMUNICATION AND REPORTING**
- **INTEREST IN CONSEQUENCES AND IMPACT**

Evaluation is relevant when it produces elements that help determine how significant and appropriate an intervention is and if it is providing the expected results. This can be addressed at different moments or phases of its implementation. Usefulness refers to the contributions made by the evaluation to identify lessons, evidence and recommendations to support

decision making related to the present and future direction of the intervention. In this sense, evaluations should be timely and practical, meeting the needs of all stakeholders involved.

E 4.1 EFFECTIVE PARTICIPATION

Evaluation is richer when it takes into account the perspectives of the different stakeholders (beneficiaries or not) in the project, programme or policy under evaluation right from its design through to the communication of results. This implies that it is important to identify them, recognise them and promote their effective participation in the evaluation in spaces and moments that are explicitly established.

E 4.2 MUTUALLY AGREED PURPOSES

The evaluation purposes (usually formulated as objectives), whether general or specific, should be made explicit and documented in the terms of reference or contract. The team or professionals responsible for the evaluation participate in and contribute to its review and make sure it is accurate so that the final version is established in mutual agreement with the entity or agency requesting the evaluation.

44

In the institutional political domain, the main recipients of evaluation results have traditionally been public authorities and high-ranking bureaucrats. Due to the need to demonstrate achievements and access limited public resources, the use of evaluation can find itself limited and opportunities to make the most of knowledge, lessons and recommendations produced from the evaluative process missed. In response to these situations, the standards in this dimension aim to increase the probability that the evaluation processes and products are valued for the knowledge and guidelines that they contribute to the development intervention actions.

This dimension's main concern is to ensure that evaluations provide useful evidence, knowledge and suggestions to improve decision making.

Each of the standards will now be described:

E 4.3 EXPLICIT VALUES

In the evaluation process, the observations, testimonies and data collected are analysed and interpreted to respond to the evaluation questions. In order to reduce bias and limitations that could affect the results of the evaluative research (and consequently the stakeholders involved), it is recommendable that those formulating the interpretations make explicit the criteria, values and points of view.

This also implies the need to make known and deliberate the conflicts of interest that can occur and affect the evaluation.

E 4.4 RELEVANT, APPROPRIATE AND TIMELY INFORMATION

The evaluation should respond to the information requested by the stakeholders concerned (those initially identified and those that emerge) with regard to their needs and problems within the framework of the inter-

vention under evaluation. The information produced should be of practical use and available and accessible when required.

E 4.5 USEFUL RESULTS

Evaluation results should contribute to a critical reflection of the object or issue at hand. In line with standards of rigour, good interpretation and good questions, together with new hypotheses and results analysis, should be achievable and feasible for those who make decisions or manage projects. At the same time, knowledge produced through evaluation should contribute to the autonomy and empowerment of recipient stakeholders as they strengthen their capacities in the face of issues and needs that the intervention under evaluation is seeking to resolve. The results and recommendations should be useful for decision-makers and project managers, for organisations and entities that wish to embark on social learning as they drive and implement interventions, for the target communities and groups and for the general public interested in the interventions.

E 4.6 TIMELY AND APPROPRIATE COMMUNICATION AND REPORTING

46

Communication in the field of evaluation goes beyond the scope of delivering or disseminating information on progress and results obtained by an intervention. It should be viewed more broadly from a participatory perspective and in collaboration with the people and communities involved in order to achieve social learning and change. Accordingly, evaluation implies a relationship of dialogue and understanding and a significant cultural and symbolic exchange between people, communities and groups. This perspective contributes to achieving empowerment and applies the principle that evaluation should contribute to the target group's transformative process.

Messages and information should respond to the needs of multiple audiences in a relevant, clear and significant way at appropriate moments. Evaluation reporting should provide information in line with these needs and consider a communication strategy to feedback

results. A flow of communication should be maintained for this purpose (from start to end) in line with the evaluation dynamics and phases. By doing this, the probability that the evaluation contributions will be taken on board and owned are greater than if communication does not take place until the end stage when the results obtained are made known.

E 4.7 INTEREST IN CONSEQUENCES AND IMPACT

The evaluation should have an impact on improving the interventions in order to contribute to improving standards of living for the people affected, promoting the responsible, sustainable and relevant use of the results.

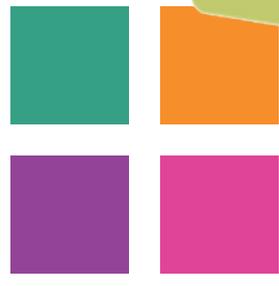
It is often thought that an evaluation is useful when it results in practical and realistic recommendations that are tailored to existing conditions that make them more feasible. However, an evaluation's usefulness should not be reduced only to this pragmatism as this impedes the production of new hypotheses and interpretations that

influence deliberations and factors considered in a decision. Both citizens and those in positions of public responsibility require information and knowledge that enable them to interpret, deliberate, shape criteria and construct options.

As evaluators, we believe that in addition to specific recommendations, it is positive for us to challenge ways of thinking, orientations and knowledge in order to better

understand the problem and the impact of interventions that have been designed and implemented. A good critical and reflective analysis of processes and results for evaluated interventions, as well as the evaluation process itself (meta-evaluation), can have an empowering effect on the people, community or group it was designed to serve and it can be more useful than many practical recommendations.

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50

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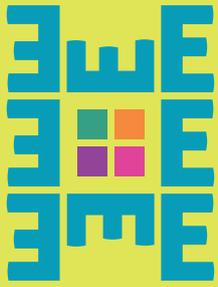
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Latin American and Caribbean Network of Monitoring, Evaluation and Systematization (ReLAC)

E-mail: coordinacion.general@relac.net

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EVALUATION STANDARDS

FOR LATIN AMERICA AND THE CARIBBEAN

The first version of the Evaluation Standards for Latin America and the Caribbean was created by the Latin American and Caribbean Network for Monitoring, Evaluation and Systematization (ReLAC) Evaluation Standards working group and was published digitally and in print in 2016.

In light of the breath-taking pace of changes in our societies and the evolution of evaluation studies and practices, we believe it would be beneficial to review our standards and assess how useful they are, ensuring they are adaptable to new needs and contexts.

As was the case with the previous version, this revised and approved edition of the

Evaluation Standards document for Latin America and the Caribbean, offers a set of guidelines so that high-quality evaluations are achieved that assist decision making for development intervention measures. These guidelines act as basic references for the whole evaluative process; they influence its design and ensure it is implemented and reported in context. It thus aims to contribute to improving quality of life and stimulating virtuous development dynamics that are useful for both accountability and learning.

The standards proposed –which intend to act as guidelines for action in the evaluation process- seek to be an instrument to address the current challenges that arise in our region.

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