



PROJECT QUALIS

Final Report



Promotor



Parceiro



Apoio



Qualis Project - Building Knowledge

Background

Third sector organizations face a variety of sustainability challenges, with the financial area being the most challenging. The ONG funding is often dependent on external, public and private entities, which compromises their action with the community.

At CLIPrd Association we support many associations in their applications for funding projects. We realized that, in addition to financial difficulties, there are other common challenges that compromise the mission of the organization. We believe that the work of organizations can be improved and strengthened, giving them practical tools for their sustainability at various levels of the organization.

Thus, we have moved towards the creation of an integrated model of capacitation following the concept of quality, adapting it to the reality of these organizations. The model has three phases: diagnosis, training plan and monitoring and recognition, through the assignment of the Qualis Stamp.

Qualis Stamp

The Qualis stamp is intended to be applied to non-profit associations, considering its specificity and good practices.

From the moment the associations were selected to participate, they were submitted to a diagnostic process (framing audit), based on the requirements of the Qualis Stamp and which determined whether conditions were met for certification or if they needed improvement.

After the process of diagnosis, the associations were trained through Workshops in the areas where they presented more difficulties in common. In addition, individualized mentoring was provided to each of the associations involved.

After this process, the associations had the opportunity to improve the points that had been marked as "partially complies" or do not comply, described in the original report.

At the end a final evaluation of the associations was made, based on the information provided, and a final evaluation table was created, which was sent to the Qualis Evaluator Committee, along with all the associations' documentation.

The Committee, composed by 5 members: José Almeida (CLIPrd Association); Isabel Vieira (Catholic University); Karim Merali (Aga Khan Foundation); Patrícia Garcia (Critical Software) and Luís Carpinteiro (GRACE) evaluated the information received and deliberated on the attribution or not of the Quality Stamp to associations.

Data on project implementation

Eight associations were registered to participate in the Qualis Project, of which only 6 reached the training and mentoring phase and 5 to the final phase of assignment of the Stamp.

The participating associations are from different areas, have several areas of intervention and with different configurations, some without paid human resources, others with small teams and others still with large teams. This diversity was important to test the flexibility and transversality of the Qualis Stamp.

The 5 associations that reached the final phase of the project were very committed throughout the project, having always been very participative in the proposed activities and worked very autonomously to achieve the Qualis Stamp criteria.

Evaluation and monitoring

Qualis was a pilot project, it was essential to collect data and evidence through its implementation, always listening not only to the participants, but also the members of the Evaluator Committee and other stakeholders in the project, such as trainers or session drivers.

The instruments we used for the evaluation were questionnaires, informal conversations and a focus group.

To make the evaluation more detailed about the various phases of the project, we will present it divided by these same phases: diagnosis, training and mentoring, cycle of conversations with companies, assignment of the Stamp and a general evaluation, joining all phases, always having evaluation of the actors and a self-assessment and reflection of the CLIPrd association.

Diagnosis

Eight associations started the diagnostic process, however only 6 completed it and participated in the evaluation of this phase.

The evaluation of the diagnostic phase required to understand the opinion of the associations on the requested documentation, the questionnaires that were requested to apply to the recipients, partners and human resources, the interview with the representatives of the association in the project and about the diagnostic report delivered.

Documentation requested

All the associations considered it very important to have sent the requested documentation so that we could know the association better and indicated that it made sense to send us. With the exception of one association, which mentioned not feeling very comfortable sharing documents that have personal data, all the others indicated that they felt comfortable to share all the documentation. Most also indicated that it was quite easy to collect the documentation for submission and that the time given for this was sufficient, and there was only one association that said it had difficulties because we were in confinement and had the documents only in physical format. No one showed any difficulties at this stage, neither suggestion for improvement.

Questionnaires

The total number of associations considered the implementation of the questionnaires very important, as well as the questions very relevant. About half of the associations indicated that it was difficult to mobilize participants and partners to respond to the questionnaires, however the majority indicated that the

time available for this was sufficient. The difficulty most indicated was exactly the difficulty in which the partners and the participants responded and the suggestion to increase the response time.

Interview

100% of the participants considered the conduct of the interview, the interview questions, the length of the interview, and the relevance to clarify issues in the other diagnostic phases very important.

Diagnostic Report

All participants considered that the diagnostic report mirrors very well or completely their association. They also felt that the recommendations presented in the diagnosis were perceptible and made sense for the association, and there were no suggestions of improvement.

General

All participants said they were very satisfied with the diagnostic phase, and only suggested that the meetings could be face-to-face.

At the end of the project, the diagnostic phase was one of those that the participants highlighted the most, as being a fundamental phase that generated the report that will accompany them for some time as a guide for improvements to be implemented.

In our opinion and, based on the feedback of the participants, we consider that this phase of the project went very well and that it was really seen as essential and useful by the associations. For the CLIPrd Association it was a very demanding and time-consuming phase, so we would like to review the information collection methodologies and the whole process in order to make it less time consuming, but maintaining its effectiveness.

Cycle of conversations with companies

In this phase 3 conversations took place with 2 companies (Montepio and Omnova), 1 association that works with companies (Grace) and the participating associations.

The goal was for these entities to talk about the importance of the criteria and how they see them, and to give suggestions to the associations on how to implement them.

In general, all the participants considered these conversations to be very useful and highlighted that the most positive thing was getting to know the perspective of these entities.

About the criteria, useful suggestions and examples were given, and the people who led the sessions were accessible. However, one association considered that these entities have some difficulty in understanding the reality of the associations and putting themselves in their place.

The associations suggested taking the time to introduce themselves to the entity, so that they could make themselves known.

The facilitators of the conversations particularly valued criteria such as transparency and communication and somewhat undervalued the evaluation and monitoring criteria, indicating that they are too demanding for non-profit

associations.

In our opinion this cycle of conversations was important to validate the importance of the criteria with the associations and to make them known these entities.

Training and mentoring

The training and mentoring phase involved different moments, 3 12-hour workshops, one in the area of monitoring and evaluation, one in the area of human resources and one in the area of communication, a clarification session on two topics that were common to the associations: mission, vision and values and plan and activity report, budget and account report and several informal moments, which were operationalized in phone calls, emails and conversations.

General Workshops

In general, the associations considered the workshops useful and relevant, with the human resources workshop standing out as positive due to its adaptation to the reality of the associations and the availability of support material. Suggestions were made that the workshops should be divided into sub-topics, that the schedule should be working hours, that there should be time between sessions for the associations to experiment, and that there should be times when the associations can get together to produce documents for the joint trainings.

In our opinion, this phase is fundamental, because it is through this phase that the capacity building of the associations occurs, and we agree with the evaluation made by the participants of the different workshops. It will be important in the future to find trainers with this capacity to adapt to the reality of the associations and to make available supporting documents and working tools.

Session "Mission, Vision, Values and Documents Required"

This session was given by the CLIPrd Association, because it was understood that in some cases it was important to clarify some doubts on the subject.

All participants rated this session as "very good" and did not indicate any suggestions for improvement. In our opinion these moments are relevant because without a formal structure they allow us to share experiences and discuss these issues with real examples, which can contribute to the implementation of changes in the association.

Mentoring

As mentioned earlier, mentoring was done in different formats, email and telephone support, document review and informal conversations.

All participants evaluated the mentoring provided as "very good " and indicated that they had no suggestions for improvement.

Qualis Stamp Assignment

The award of the Qualis Stamp was decided by an evaluating committee, referred to above and which was responsible for, based on the evaluation and documentation that the technical team of the CLIPrd Association has given them, deciding whether to award the Stamp to each of the participating associations.

To present the evaluation carried out on this phase, we will divide what was said by the participating associations and the Evaluation Committee.

Participating associations

All the associations evaluated this phase as "very good" and the majority indicated that the final evaluation represents their association.

Evaluation Committee

The Committee congratulated the CLIPrd Association for the Qualis project and for the way it was conducted throughout its implementation and reinforced the importance and relevance of a project like this.

Regarding their evaluation of associations, they commented that it is easier to evaluate associations that they have already heard of or that they can easily find organized information online when researching about the association. On the other hand, when they are associations with which they have relationship it can be difficult to be impartial in this process.

In general, all members felt that it was somewhat difficult to evaluate the associations because, although all the collected and necessary information was sent out, they felt that they lacked a better understanding of the associations.

They also added that there are items in the criteria that are not very objective and are therefore difficult to evaluate, for example "Diversity in funding sources", where it is not possible to understand what is meant by "diversity".

They also stressed that, in their opinion, the Qualis Stamp is for associations that develop social intervention and that it should be only for this type of participation.

They left several suggestions for improving this final phase, for example, the Committee could have a moment with each of the associations to clarify doubts, before deciding on the attribution of the Stamp.

In our opinion, this is the phase that needs the most improvement, and it is fundamental that the suggestions given by the Committee be applied.

Qualis Project - general

When the associations were asked to evaluate the project in general, they all rated it as "very good", as well as the performance of the CLIPrd Association in implementing the project.

The added value of the project was pointed out as being a small group, which allowed them to get to know other associations and create synergies that go beyond Qualis, the sessions took place online and the project allowed each association to understand where they stood and what they needed to improve.

As challenges, they identified the internal restructuring that often does not depend only on the technicians who are participating, but in which the board members must get involved, the schedules of the sessions (after working hours) and the difficulty of having time to implement what they learned in the workshop sessions for the following sessions.

They also emphasized the importance of having an external entity (CLIPrd) see what they do, identify the improvements needed, and support them in this process.

They also left some suggestions for improvement, such as having face-to-face working moments, having follow-up sessions during the implementation of the project, and the associations being able to work together on the documents they must produce.

Finally, each association was asked to describe the Qualis project in one word, and the words that came up were: Empowerment; Legacy; Support; Challenge.

As previously mentioned, throughout the project we were always receiving feedback from the various intervening parties, and based on this, we would only like to add to all that has already been exposed that it would be important to have a criterion related to volunteer management and to simplify the evaluation and monitoring criteria.

For CLIPrd Association, the implementation of the Qualis project was a great challenge, not only because it started in the middle of the pandemic, but also because it was something completely new. However, it was a challenge that we consider having been overcome, because despite all the setbacks, we managed to fulfill the project's objective and have the basis to move forward with a more solid and consolidated version of the project. The feedback we received from all the stakeholders was incredible and reinforced the importance of working on the creation of the Qualis Stamp.

Clues for the future

Thinking about all that the Qualis project was, all the feedback we received, our perception and our analysis of this report, we have identified the following clues for the future:

- Participating associations when they sign up need to be aware of what the whole project is about and commit to seeing their participation through to the end.
- Allow more time for the application of the questionnaires to the associations'

partners and participants.

- Make face-to-face visits to the associations during the diagnosis.

Review the evaluation tools used in the diagnosis in order to speed up the process;

- Evaluate the trainers and contents of the trainings before they are implemented, making sure that support materials and practical tools will be made available;
- Adjust the schedule of the trainings;
- Create collective and face-to-face working moments for associations to develop what they are learning in the training;
- Develop more informal moments about the criteria in general or some in specific with private entities, but also among the associations;
- Dynamic follow-up sessions with the associations throughout the implementation of the project;
- Clear and objective definition of each item of the criteria and how it should be evaluated;
- Session between each of the associations and the evaluating Committee before the decision is issued;
- Inclusion of a criterion on volunteer management in the Stamp;
- Revision of the evaluation and monitoring criteria to simplify them and make them less demanding.