

# Innovation and Sustainability in the Social Economy: A Case Study of Organizational Change of a Social Portuguese Organization

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**Abstract:** In Europe, the Social Economy is responsible for about 10% of the European business sector, with a share of about 6% in total employment (about 11 million people), revealing an industry that will be called to give a greater contribution to the current problems of unemployment and social cohesion in Europe due to the ongoing social and economic transformation. However, research on the phenomena of the Social Economy still lacks in many respects, concerning, for example, its role in the development of local, regional and national competitiveness. There is a lack of methodologies, tools and indicators appropriate to the social economy. This could be caused by the complexity and diversity of the organizations, on one hand, which is a barrier to their comparability, and on the other hand, to its late and recent recognition on the production of public services. Changes on public policies, the economic and financial crisis, the spread of unemployment and poverty, brings to the light the importance of these organizations, which are ceasing to be residual in economic terms, and are becoming, alongside the State and the Market, a mainstay of the economy. This article is a case study of a Social Economic Organization, where we will examine, in the light of the literature on strategic management, and innovation, its organizational change, which was critical to ensure its survival. Through this case study we intend to increase the understanding and the knowledge on the main motivations, barriers and facilitating factors leading to the improvement of the quality of the services, and the efficiency of the management of the Social Economy Organizations, which contribute to its competitiveness and sustainability. The case study highlights a number of best practices in the design of structured innovation processes, which were supported by the Portuguese Program Q3- Qualifying the Third Sector, which may help similar organizations to improve their innovation and organizational processes, which are essential to increase their competitiveness and sustainability.

**Keywords:** innovation, strategy, social economy, nonprofit sector, alternative economy, organizational change

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## 1. Introduction

In this case study we look at the process of organizational change in a non-profit institution. We begin this work with a brief review of concepts related to social economy and to strategic management and innovation, in order to define the analytic framework used throughout the paper. Then we identify the adopted methodology and, finally, the case of the Luis Bernardo de Almeida Foundation will be described and analyzed.

## 2. Conceptual framework

According to CASES (2010), the term Social Economy is ambiguous because it accommodates a wide range of concepts, such as the "third sector", "non-profit sector", "social economy", "alternative economy", among others. It is very difficult to establish a single concept and define the frontiers of Social Economy. For instance, the Portuguese national statistics office (INE) and the non-profit institution CASES (Antonio Sergio Cooperative for Social Economy) use the definition proposed by CIRIEC (2012) on the pilot project Satellite Account of Social Economy for Portugal (SASE)-2010:

"Set of private firms, formally organized, with autonomy of decision and freedom of membership, created to meet the needs of its members through the market, producing goods and services, ensuring financing, where the process of decision making and benefit or surpluses sharing is not directly linked to capital or contributions of each member, but corresponding to each member one vote. The Social Economy includes also private entities formally organized, with autonomy of decision and freedom of membership that produce non-market services for households and whose surpluses, if any, may not be appropriated by the economic agents that create, control or finance them."

In Europe, Social Economy activities contribute to about 10 % of the output of the European business sector, with a share of about 6 % in total employment (about 11 million people), revealing an industry that will be called to give a greater contribution to the current problems of unemployment and social cohesion due to the social and economic transformation under way.

In Portugal, this sector, according to INE and Cases (2013), comprises Cooperatives (2,260 units); the Mutual Societies (119 units); a network of charities known as Santa Casa da Misericórdia (Holy House of Mercy) (381 units); Foundations (537 units) and Associations and other organizations in the Social Economy (52,086 units), involving 55.383 organizations, with a share of 5.5% of the total paid employment, representing a proportion of 2.8% of the gross value added.

According to Soares et al (2012) two thirds of the expenses of these organizations are related with the cost of goods sold and materials consumed (including the cost of food), staff costs, services and utilities costs. On the other hand, they indicate on their budget a great proportion of State contribution. The Social Economy Sector is facing a huge set of challenges and weaknesses, which include, among others, the following: (1) the high dependence on financial support from the state; (2) the requirement to fulfill a set of criteria and rules imposed by the State, in order to maintain public support, particularly in terms of professionalism, quality and accreditation; (3) sustainability in a context of economic crisis, with a probable reduction in support and growth of social problems; (4) the need to reinvent their business models in order to avoid chronic shortages; (5) professionalization of top management; (6) economies of scale; (7) the qualifications of employees; (8) leadership; (9) equipment and facilities; (10) ICT integration; (11) demographic change; (12) asymmetries in population distribution.

To face these challenges and weaknesses it is imperative to improve the quality of the services and the effectiveness of management, thus contributing to competitiveness and sustainability. The following areas are particularly important: (1) forms of organization and management; (2) value chain of services; (3) integration of ICT; (4) improvement of procedures for quality certification; (5) development of internal skills: training and development for leaders and training for employees; (6) models of inter-institutional cooperation.

The Social Economy organizations need to rethink their operating logic, without, however, neglecting the purposes for which they were established, so it seems particularly relevant the establishment of structured practices on strategic management and innovation. These weaknesses can be addressed through a program to support the development and qualification of individuals and organizations, integrating actions of training and consultancy.

To Rumelt, Schendel & Teece (1994) strategic management (also called “policy” or “strategy”) is related to the course of an organization, including the issues that are at the heart of top management preoccupations and those who are associated with the reasons why a business succeeds or fails. Hitt, Ireland & Hoskins (2011) states that “the strategic management process is the full set of commitments, decisions, and actions required for a firm to achieve strategic competitiveness and earn above-average returns”, or in other words, it is the successful formulation and implementation of a strategy that creates value.

The basic elements constituting the cycle of strategic management are the analysis of the environment, the formulation and implementation of strategy, assessment and monitoring. The analysis of the environment includes analysis of: the general environment, the industry/sector, competition, organizational structure, organizational culture and the resources that the organization has at its disposal. The process of formulation of strategy is closely linked to the progress of long-term plans in order that an organization deals effectively with the opportunities and threats that it faces in its environment, in light of its strengths and weaknesses. Strategy formulation is then made by the mission, objectives, strategies, (comprehensive description of how the organization will achieve its mission and objectives) and policies (which are lines of action that will support decision making). Strategy Implementation is related to the execution/implementation of strategies through the explanation of programs (activities necessary for the completion of a plan), budgets (programs in financial terms) and procedures (sequential steps that describe in detail how to perform a specific task or function). Assessment and control are processes that allow the tracking of activities and results of the organization in order to be able to compare the actual to the desired performance, allowing the introduction of measures to mitigate the observed deviations.

Hrebiniak (2006) argued that managers know little of strategy implementation and they are not trained to implement strategy, only to plan. Another problem is related to the general conviction that strategy implementation plays a minor role in terms of the hierarchy of strategic actions, being more adequate for lower levels of management, forgetting that management commitment is essential to a successful implementation. The author also argues that the top six obstacles that managers face are: (1) inability to

manage change; (2) poor or vague strategy; (3) not having guidelines or a model to guide implementation efforts; (4) poor or inadequate information sharing; (5) unclear responsibility and accountability; (6) working against the organizational power structure. The case study addressed in this article shows the importance of such items.

Strategy and innovation are distinct concepts both in terms of definition and function, being innovation a source of competitive advantage. The continued growth of the importance of innovation is also related with its capacity to make changes in the competitive position of organizations. Thus, innovation and strategy are complementary and feed on each other (Dobni, 2010). According to the Oslo Manual (2005), which establishes the guidelines for the collection and interpretation of data on innovation, developed by the OECD: "An innovation is the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organizational method in business practices, workplace organization or external relations". The Social Economy Organizations develops essentially services, which have a set of characteristics that distinguish them from the goods: (1) Intangibility; (2) Heterogeneity; (3) Simultaneity; (4) Perishability. According to Dantas & Moreira (2011), and Booz, Allen and Hamilton, cited by Edvarsson et al (2000) innovation in services can be classified into categories that range from "Worldwide new services" to "Cost reductions".

Organizational change is the process of converting an organization from its current state to a desired future state (Sullivan, 2009). All innovation results in change, but not all change is innovation. The core techniques for managing organizational change include: (a) Strategic planning: The changing areas are called objectives or strategies and are intended to guide the teams in the development of ideas or projects to achieve objectives; (b) Performance Evaluation: Assign measures or indicators to critical aspects of organizational performance; (c) Management of Creativity: Generating ideas or problem solving; (d) Project Management: Need to effectively manage multiple tasks and initiatives; (e) Knowledge management: How to effectively manage change for managing the information associated with the change;

Furthermore, to define and implement a structured process of strategic management and innovation, it is important that the organization defines how it creates, delivers and gets value (business model). The business model is like a plan for a strategy to be implemented through organizational processes and systems structures. The application of this concept is new in the area of Social Economy. Some of these conclusions are applicable to the present case study, as shown below.

### **3. Research method**

We use the case study methodology as a valid way of exploring existing theory and as a exploratory way to provide an integral vision and a general understanding of a phenomena (Yin, 2009). In this research, we analyze the organizational change operated on a Social Portuguese Organization. Following a literature review, eleven in-depth interviews were conducted with managers in Luiz Bernardo de Almeida Foundation. It was possible to relate the empirical data with several ideas advanced by the literature.

The methodology is not prone to generalizing the results, due to the specificity of the context, but it highlights a set of good examples concerning the key factors for the establishment of an effective innovation and sustainability strategy for social economy organizations.

### **4. Organization profile**

The Luiz Bernardo de Almeida Foundation (from now on, LBAF) is located in the county of Vale de Cambra and was established in 1957 in order to fulfil the testamentary disposition of Commander Luis Bernardo de Almeida. Its heritage consists on the assets of its founder and the other values acquired throughout its existence.

The institution started functioning with a nursing home in 1972, and in 1985 implemented a Home Support Service, directed at the elderly. This service was one of the first to be created at the District level. The institution also has manages a Day Centre, where the beneficiaries are also elderly people that are independent in terms of mobility. In 1999 an Office of Family and Community Support was created. In October 2004, a nursery school was built. The Family Support Service is directed at kindergarten level children.

## **5. The process of organizational change**

The process of organizational change begins when the board of LBAF took certain decisions that proved to be crucial for the survival of the institution. These decisions were followed by an application to the so-called Q3 Program (Qualifying the 3<sup>rd</sup> Sector), a national program that aims at developing skills and organizations of the 3<sup>rd</sup> sector, improving the quality of their services, the effectiveness of management and contributing to their competitiveness and sustainability through participated and sustained processes of consultancy and training. The aim of the board was to ensure the sustainability of LBAF, and the improvement of the quality of services. There was a strong belief that the organization had a poor organizational performance, which was translated into weak economic and financial results and on poor service provision, so it would be extremely important to know the causes of this poor performance in order to mitigate or even eliminate them.

The Q3 Program had other advantages, besides cost, which include an integrated, impartial and experienced vision by an external and recognized entity, that would identify the main problems that the institution was facing and provide a framework to manage the actions to mitigate or extinguish those problematic situations, through actions of training and consulting made to fit the organization profile, its size, the problems identified and the defined objectives. The Q3 Program involves a strong partnership between some important organizations in Portugal: AEP (Chamber of Commerce and Industry), Fenacerci (National Association of Social Solidarity Cooperatives), Minha Terra Federation (Portuguese Federation of Local Development Associations), CPCCRD (Portuguese Confederation of Culture, Recreation and Sport communities), UTAD (University of Trás-os-Montes and Alto Douro), among others. The intervention follows a model, which involves several phases: recruitment and selection, conducting a diagnosis, preparation of a development plan, implementation measures, review plan and recommendations. All activities are evaluated externally and internally validated, and all actors (consultants and trainers) have certified skills in order to act in accordance with the procedures to ensure the quality and effectiveness of the intervention. The intervention on the organization had a duration of about one year and followed the steps described below.

## **6. Organizational diagnosis**

This phase began with the signing of the Development Contract - the document which defines the commitments between the organization and the organization that manages the intervention in order to promote the desired organizational development of the beneficiary of the intervention.

The organizational diagnosis is essential because at this stage all the problems are identified and the goals that are the target of the intervention are defined. It is, therefore, necessary to resort to the holders of the knowledge of the organizational reality, elements that experience the daily life of the organization and make the exploration of problematic situations. The idea is to maximize the participation of the whole organization in gathering problems, where the consultant only assumes the role of a listener/agent/moderator.

In the realization of the organizational diagnosis, the main reference activities that sustain it are: (1) Listening to people; (2) Documentation review, (3) Sectoral framework and context; (4) Problem tree; (5) Current Situation/Desired Situation; (6) Objectives Tree.

In addition to listening to people, there are also, at this stage, activities that promote their participation in all stages of the process: (1) Meetings with Top Management; (2) Meetings/contacts with an internal facilitator; (3) General Sessions held for the entire organization. On the analysis of the tree problem, a key tool of the diagnosis, it was found that the general problem of LBAF was a poor organizational performance. Seven intermediate problems were identified as causes of this general problem: poor organizational structure; poor planning of activities; poor management practices in human resources; scarcity of financial resources; poor implementation of quality and a lack of employee skills, having been detected 85 terminal problems as causes of these intermediate problems.

To analyze the organizational structure, five basic components of it were considered (Mintzberg, 1999), where some terminal problems of LBAF were fit:

- Strategic level: the strategic level comprises the organizational decision makers, here materialized in the board function. The problems identified relating to this component were, among others: poor strategic management and reduced operational presence of the board.

- The Technostructure: comprising the rules and procedures for managing the behaviors of employees. In this component were identified, among others, issues of horizontal and vertical differentiation, which were manifested in a poor communication between hierarchical levels and lack of team spirit; problems of formalization as a poor definition of roles and tasks and also problems located at the level of centralization, such as an excessive number of tasks and responsibilities centralized in the Technical Director.
- The Support Staff: includes employees that are not directly involved in producing goods or services. However, they have the responsibility to support the primary activities, such as, for example, cleaning and feeding. In this field, several problems were detected, including deficient HACCP and cleaning practices.
- Intermediate Level: includes managers who make the connection between the strategic level and the operational level. We can include the services and technical direction, as well as the sector supervisors. In this component, problems such as poor management of teams (inadequate control range), lack of sectoral meetings, lack of performance evaluation and a poor distribution of tasks were identified.
- Operational Level: includes all employees of the institution running the production of goods or services. Here problems were also detected, among others, difficulties in interpersonal relationship, resistance to change and lack of a training plan.

Although the weaknesses of each component of the structure were identified above, the weak points in this structure, in general terms, were due to a slow level of organizational response compared to environmental changes, to inter-departmental communication difficulties, to a restricted vision of the organizational objectives, to a lack of unity of command, to a difficulty in determining the extent of the authority and competence of managers and to inadequate control range.

## **7. The process of implementation**

### **7.1 The development plan**

In this section the development plan established to bring change to the organizational structure is presented, showing the main results of the actions made. A summary of the evaluation of these actions is made in the next section.

The Development Plan establishes the training actions which allows the transition from the current situation to the desired situation. The plan is based on the following tools: (1) Actions tableau; (2) Actions tableau by activities; (3) Project Planning by Objectives Matrix; (4) Implementation Schedule. In the development plan we look for appropriate and feasible solutions to solve the problems of the current situation and achieve the goals of the desired situation. Resort was made to the technical expertise of the consulting team and the elements of the organization, seeking to expand the use of the knowledge hold by these elements, and using creativity to find the most appropriate, diversified and financially encompassed solutions.

Under the Q3, all the predicted actions are of a training nature, and may fit into the following types:

- Employees Qualification: within this typology the following training activities directly related with the problems of organizational structure identified above were established: (1) Operations Management; (2) Interpersonal and conflict management; (3) Quality Management - Food Area and (4) Customer Service.
- Implementation of improvement projects: within this typology, the following training activities aimed at solving problems related to organizational structure were established: (1) Strategic Management Practices; (2) Quality Management System; (3) Cooking Techniques; (4) Geriatrics; (5) Team management and (6) Human Resources Management .
- Thematic workshops.

The development plan was pre validated by the management and was discussed with everyone in the organization before the final version, benefiting, therefore, of the participation of all in the definition/specification of the actions to implement. The presented development plan solely corresponded to the set of eligible actions under the Q3 Program, although the board itself drawn up a set of own actions in order to simultaneously eliminate or mitigate problem situations not eligible by the Q3 Program.

## **7.2 Implementation schedule**

A timeline was stipulated for the implementation of training activities leading to the resolution of identified problems, which had a duration of five months. The entire project had a one year duration, and it was composed with about one hundred hours of consultancy and two hundred and forty hours of training activities.

## **7.3 Implementation of the development plan**

In the initial diagnosis eighty five terminal problems were detected that resulted in eighty-five goals. Thirty of these were not achievable by conducting training activities, so the eligible objectives supported by Q3 funds were fifty five. These resulted in twenty-three results to be achieved. In addition to the actions recommended in the Q3 Program, eight actions were established in conjunction with the board of the organization, in order to achieve the objectives not covered by the Q3 Program. An activity tableau of ten actions/activities was prepared, but it was possible to perform one more action in addition to the initial proposal (Management Control).

## **8. Results of the actions**

### **8.1 Results achieved**

All twenty-three expected results were achieved. In addition to these, the intervention allowed for several changes, which affected several areas of management and operation of the organization, particularly with regard to its organizational structure. From the results achieved, it is particularly important to stress those that are most directly related to the organizational structure. A new organizational structure was defined, whose main goal was to move from a mechanistic bureaucratic structure to a horizontal structure. The main motives which governed the development of this type of structure were related to greater customer proximity based on speed, efficiency and quality of services, a greater flattening of the organizational structure, the search for competitive advantage in a turbulent external environment, the creation of real teams and the facilitation of collaboration, a greater emphasis on operational processes as a creator of value, a delegation of work to the lowest level.

In order that the implementation of the new organizational chart was successful, the chart was redesigned, adding activities and services actually rendered by the organization and which were not reflected in the older chart, having as a direct result the ability to clearly define the roles, tasks and responsibilities of each member in the organization

It was also implemented a methodology for evaluating the individual and team performance and development, identifying the training needs of each element in order to maximize their performance at the individual level or at the level of working groups. In order to simplify procedures and minimize the resistance of employees in its implementation, two training actions were undertaken in quality management systems, and the organization decided to move forward in the implementation of the ISO 9001: 2008 standard in its five dimensions.

A final observation is due related to the conduction of training activities directed to all managers, in order to develop skills in implementing effective leadership, and two training activities designed to improve the skills of employees in teamwork and conflict resolution.

### **8.2 Summary of actions assessment**

In order to know if the problems were solved and what improvements the organization experienced, the opinion of the organization leaders and the facilitator were sought considering the Actions or Activities implemented and the most important results, either in the immediate or short term. There was a strong commitment in the implementation of the Actions and in achieving the expected results, which led to a successful result. All the implemented measures were considered very important by the leaders and the facilitator. The measures that were believed to have a greater impact in the organization, and that fitted the problems related to the Organizational Structure of LBAF identified above, were the following:

- Quality Management System

- Quality Management-Food Area
- Strategic Management Practices
- Human Resources Management

Regarding the results achieved which had the greater impact, they are those derived inherently from the above actions:

- Implementation of Quality Management System in Social Responses
- Implementation of HACCP System
- Strategic objectives definition
- Organizational Structure Restructuring materialized in the design of a new organizational chart, with a consequent redefinition of roles, tasks and responsibilities.

## **9. Conclusion**

In this section, we present the perspective of the Board of LBAF about the strengths and weaknesses of the Q3 model intervention, and the results of the external evaluation, conducted by UTAD (University of Trás-os-Montes), of the implementation of the programme.

The board recognized that the positive aspects or strengths far outweigh some of the negative aspects or existing weaknesses. The managers interviewed even had some difficulty in identifying negative aspects or weaknesses of the intervention. The concentration of the implementation of the various steps/activities within a relatively short period of time, five to six months, was the weak point mentioned by the interviewees. This resulted, for example, in the reduction of the availability of time by managers and employees in the implementation of the actions, which in some periods was very demanding. In general, the strengths of the intervention were highly valued by the leaders of the organization.

The Q3 project increased motivation and the degree of participation of the people in the organization; it identified in a clear way the existing needs; it improved internal operations (e.g., by redefining organizational structure, new processes and services); it forced members of the organization to look inward and to look for solutions; it allowed new learning through training focused on very specific needs; it allowed to have an enlarged, both external and internal, vision. Essentially, the project's strong point was the creation of favourable conditions for change in the organization which, as mentioned above, involved large parts and several dimensions of the organization.

The methodology of participatory action training, implemented by external elements with facilitation skills and processes in the field of management, as well as sensitivity and experience in the context of non-profit organizations, is an efficient and effective tool for organizational change, adaptable to various circumstances. However, their success depends largely on its appropriation by the organizations, through the commitment and participation of managers, technicians and employees. In addition, the state of necessity and awareness of the urgency of change in organizations is also a factor of great importance (Batista and Cristovão, 2011).

Finally, the final evaluation report of the implementation of the Q3 Program, conducted by UTAD in partnership with CETRAD praised the implementation of the Q3 program in LBAF, considering it an example of best practice in implementing change that crossed several fields of management and operation of the organization. It highlighted the participation of the leaders, including the Board, its commitment and permanent participation (it followed daily activities, being present in the training sessions), the degree of employee involvement, which was marked by adherence to the process and the interest and potential that they saw on it.

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