



Lisbon School
of Economics
& Management
Universidade de Lisboa

MASTER
INNOVATION AND RESEARCH FOR SUSTAINABILITY

MASTER'S FINAL WORK
PROJECT

**FOSTERING INCLUSION THROUGH BEST BUDDIES
INTERNATIONAL: A SUSTAINABLE AND INNOVATIVE
APPROACH IN THE PORTUGUESE CONTEXT**

MATILDE FALCÃO NOUTEL PEREIRA CANCELA

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Each of us is at that point in our lives when we need to decide how we'll respond to the world's challenges. Will we act with courage or with fear? With love or with hate? Will we embrace the differences that make us unique, or will we reject them?

Eunice Kennedy Shriver

GLOSSARY

APSA – Associação Portuguesa de Síndrome de Asperger
APT21 – Associação Portuguesa de Trissomia 21
BBI – Best Buddies International
BBLC – Best Buddies Leadership Conference
BBP – Best Buddies Portugal
CERCI – Centro de Recuperação de Crianças Inadaptadas
CRPD – United Nations Convention of the Rights of People with Disabilities
ENIPD – Estratégia Nacional de Inclusão da Pessoa com Deficiência
EPIS – Associação Empresários para a Inclusão Social
IDD – Intellectual and Development Disability
ISEG – Instituto Superior de Economia e Gestão
MAVI – Modelo de Apoio à Vida Independente
MFW – Master’s Final Work
MIRS – Master in Innovation and Research for Sustainability
NGOs – Non-Governmental Organizations
ODDH – Observatório da Deficiência e dos Direitos Humanos
SCM – Santa Casa da Misericórdia de Lisboa
SDGs – Sustainable Development Goals
SEN – Special Education Needs
YLC – Youth Leadership Council

ABSTRACT

Disability and inclusion represent critical challenges within social, cultural, and political domains, directly impacting equity and the realization of human rights. Individuals with intellectual and developmental disabilities (IDD) continue to face systemic barriers to education, employment, and full participation in community life. These challenges are compounded by inconsistent definitions of disability across legal and policy frameworks, which lead to fragmented support systems and hinder the development of coherent, inclusive strategies at both national and international levels.

This research project aims to address these gaps by analysing the implementation of Best Buddies International (BBI) in Portugal. BBI operates through five core pillars—one-to-one friendships, integrated employment, leadership development, inclusive living, and family support—which together foster social inclusion and promote the active participation of individuals with IDD. Each pillar is designed to support the empowerment and independence of people with IDD, while also fostering broader societal change.

The main objective of this project is to develop a business plan for Best Buddies Portugal. This plan will serve as a strategic framework to guide the organization's sustainable implementation and long-term viability. By combining insights from literature, quantitative data, and stakeholder interviews, the project proposes practical and scalable strategies that align with the Portuguese socio-political context. In doing so, it contributes to reducing inequalities and advancing a more inclusive society in which individuals with IDD have equitable opportunities to lead meaningful, autonomous lives.

Keywords: Intellectual and Development Disabilities (IDD); Social Inclusion; Best Buddies International; Strategic Plan; Innovative Approach.

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1. INTRODUCTION

1.1. BACKGROUND AND CONTEXT

Intellectual and developmental disability (IDD) is a complex issue at the intersection of human rights, social justice, and community development. People with IDD face systemic barriers to education, employment, and social engagement, as their disabilities manifest in social, conceptual, and practical skill limitations (Lee et al., 2019). Disability and inclusion discourses span cultural, institutional, and policy domains, reflecting broader equity and human rights challenges (Lawson et al., 2021).

Disability is conceptualised differently in different countries, shaped by different frameworks. Bolderson et al. (2002) outline two primary models: the medical model, which sees disability as an individual impairment requiring treatment, and the social model, which attributes disability to societal barriers. Recognising these differences is critical to fostering international policy coordination and promoting social inclusion (Verdugo et al., 2017). Inclusion goes beyond physical integration and emphasises equal opportunities, genuine social connections and mutual respect (Jardinez et al., 2024). The struggle for inclusion has historical roots, with the emergence of disability advocacy in the 19th century and the empowerment of persons with disabilities to lead social movements (Sabatello, 2013). The global human rights movement strengthened disability advocacy, most notably with the 1993 World Conference on Human Rights, which resulted in the Vienna Declaration emphasising universal human rights (United Nations, 1993). Subsequently, the UN adopted the Standard Rules on the Equalisation of Opportunities for Persons with Disabilities, advancing the legal framework for disability rights. Despite progress, challenges remain due to lack of awareness and inconsistent definitions of disability.

This research critically examines existing policies and practices to identify gaps and propose pathways towards a more inclusive society. Addressing both behavioural and structural barriers through innovative strategies can empower people with IDD (Andersson et al., 2024). Successful inclusion initiatives around the world demonstrate the impact of structured programmes. Best Buddies International (BBI) exemplifies this by promoting social inclusion, employment and leadership opportunities. This research explores the feasibility of implementing BBI in Portugal to address current societal challenges. By adopting sustainable strategies that focus on friendship, employment, leadership, inclusive living and family support, Portugal can promote the full participation of people with IDD in community life (Schalock & Verdugo, 2012).

1.2. RESEARCH PROBLEM AND OBJECTIVES

This study places inclusion at the centre of its investigation, advocating for an approach that embraces diversity and creates an enabling environment for all individuals focusing on answering the research question: *How can Best Buddies be sustainably and innovatively implemented in Portugal to promote the inclusion of individuals with intellectual and developmental disabilities (IDD)?*

To address this question, the following objectives are delineated:

1. To analyse the current landscape of inclusion for individuals with IDD in the world and more specifically in Portugal, identifying gaps and opportunities.
2. To evaluate the best practices of international and Portuguese NGOs working in the field of inclusion, specially of individuals with IDD.
3. To examine the social, economic, and cultural impacts of Best Buddies on participants and the wider community.
4. To propose a framework for the sustainable and innovative implementation of the Best Buddies program tailored to the Portuguese context.
5. To offer actionable recommendations for stakeholders to ensure the long-term success of inclusion initiatives.

By leveraging this research and answering the proposed question, the implementation of BBI in Portugal has the potential to significantly enhance social inclusion, empower individuals with IDD, and positively influence the broader community, setting a benchmark for inclusive practices nationwide.

1.3. RELEVANCE OF THE STUDY

The Master in Innovation and Research for Sustainability (MIRS), at the Instituto Superior de Economia e Gestão (ISEG), explores the intersection between innovation and sustainable development. This study focuses on BBI, an organisation that promotes sustainable social innovation, particularly in reducing inequalities and promoting inclusion, in line with the United Nations Sustainable Development Goals (SDGs).

The analysis of BBI's implementation in Portugal provides a practical application of MIRS principles, including stakeholder engagement, policy advocacy and impact measurement. The research explores how the BBI model can contribute to the SDGs by creating scalable, sustainable social innovation frameworks aligned with national priorities. The study focuses on *SDG10: Reduce inequalities*, with an emphasis on empowering people with IDD through inclusive opportunities. It also examines *SDG4: Quality Education*, recognising the role of education programmes in promoting

leadership and understanding diversity. *SDG8: Decent work and economic growth* is addressed by promoting inclusivity in the workplace and ensuring equal employment opportunities for persons with IDD. In addition, the project aligns with *SDG16: Peace, Justice and Strong Institutions* and *SDG17: Partnerships for the Goals*, highlighting the role of strong institutions and cross-sector collaboration in sustaining inclusion initiatives. Social sustainability, often overlooked in favour of economic and environmental sustainability, is central to this research. By highlighting the role of BBI in promoting inclusion, the study positions inclusive practices as essential for building resilient communities. Given Portugal's socio-economic context and efforts towards inclusion, this research is both timely and impactful, contributing valuable insights to the discourse on social justice.

This Master's Final Work (MFW) reflects the multidisciplinary nature of sustainability, integrating social sciences, economics and management to address pressing societal needs. The innovation of the study lies in the adaptation of the BBI model to the Portuguese cultural, legal and economic landscape, which requires new approaches to funding, partnerships and public awareness. Its practical implications are significant, offering policy recommendations and strategies for supporting NGOs such as BBI, while emphasising workplace and community inclusion. By addressing global and local challenges, this MFW advances both academic knowledge and societal impact. It contributes to the achievement of the SDGs and reflects ISEG's commitment to interdisciplinary problem solving and sustainable social innovation.

1.4. STRUCTURE OF THE REPORT

The MFW is organized into six chapters providing clear and logical progression of the topic of research. In a first phase and before the development of the work in the structured chapters, the glossary, the abstract, the tables of contents and figures and the acknowledgements are included.

Chapter 1 (Introduction) serves as the gateway to the study, establishing its background, context and objectives. This chapter introduces the research problem and outlines the significance of the project, ensuring a clear understanding of its purpose. By providing a roadmap of the structure of the study, this section helps the reader to grasp the key ideas and relevance of the research. Chapter 2 (Literature Review) presents a literature review, exploring key concepts such as IDD, social inclusion, the status of inclusion in Portugal, and the policies, legislative frameworks, and barriers affecting inclusion efforts. This chapter is most important to establish the academic basis of the study. Highlighting key concepts and theories proves the understanding of the field of study and justifies the importance of the research, strengthening the study's theoretical and practical framework. This also focuses on focuses on BBI contextualization, its story and role in promoting the

social inclusion of individuals with IDD in the society. Chapter 3 (Project Development) details the methodology employed in the research, ensuring transparency and replicability of the findings, providing a clear framework for the development of the study and its conclusions. This chapter enhances the credibility of the research by providing a valid justification for the methodological choices, connecting quantitative and qualitative data, proving all the theory presented in the literature review and ensuring the viability of the proposed study. Aligning this with BBI's goals and Portugal's social and cultural needs, justifies BBI's implementation in Portugal, emphasizing its potential to address challenges nationwide. Chapter 4 (Best Buddies Portugal: Five-Year Vision Plan) outlines a strategic framework for innovation within Best Buddies Portugal (BBP). It begins by tracing BBP's history and activities, analysing its evolving structure. By aligning BBP's mission with Portugal's social and cultural needs, this chapter justifies its implementation and highlights its potential to address nationwide challenges. The plan offers sustainable, innovative solutions to ensure BBP's success, providing key insights and actionable recommendations. It focuses on a five-year strategy, setting out short, medium and long-term objectives to promote the social inclusion of people with IDD through tailored Best Buddies programmes. The final chapter, Chapter 5 - Conclusion & Future Recommendations, is critical to summarize the project's key findings and evaluating the viability of the implementation of BBP, highlighting its important role in promoting social inclusion of individuals with IDD. This chapter is also essential to identify areas for future research, both in the academic and practical domains, to reinforce the project's potential in promoting the mission of inclusion in the Portuguese society.

Additionally, besides the References, there are 9 annexes to provide extra information and data that supports the research, enhancing academic rigor and transparency.

2. LITERATURE REVIEW

The social inclusion of people with IDD is key for modern research, emphasising equal opportunities, community participation and meaningful relationships. Inclusive policies, supportive education and accessible employment improve their quality of life. However, stigma, lack of awareness and systemic barriers hinder full inclusion. Research highlights community-led initiatives, partnerships and technology as solutions. This review examines frameworks, challenges and strategies to improve inclusion and reduce inequalities.

2.1. UNDERSTANDING INTELLECTUAL AND DEVELOPMENTAL DISABILITIES

Understanding intellectual and developmental disabilities (IDD) requires a broad perspective that includes medical, psychological, historical, cultural and societal factors. IDD includes a range of conditions, such as intellectual disability, autism spectrum disorders and cerebral palsy, all of which affect cognitive abilities, adaptive skills and social interactions in different ways. Over time, the terminology used to describe these conditions has evolved, with older terms such as 'idiot', 'feeble-minded' and 'mentally retarded' now considered outdated and offensive (Northway & Oloidi, 2023). Examining the changing definitions and perceptions of IDD highlights the importance of inclusivity and societal attitudes that shape the experiences of people with disabilities. Despite variations in definitions, three core criteria remain consistent: intellectual challenges; difficulties in social settings, particularly in large groups; and early onset of impairments in childhood (Northway & Oloidi, 2023). These challenges manifest not only in cognitive domains but also in daily interpersonal interactions. As Márcia Ferreira, therapist in Diferenças highlights, *Key difficulties in social interactions include communication barriers, social stigma, and challenges in understanding implicit social norms.*

Although people with disabilities have always been part of society, historical records are scarce before the eighteenth century. The French physician Edward Seguin introduced educational and moral treatment methods for people with IDD (Trent, 1994). Initially, institutions aimed to educate individuals and reintegrate them into their families, but industrialisation and social change meant that many remained institutionalised and the focus shifted to medical study and control (Ryan & Thomas, 1987). As disability studies developed, advocacy for inclusion grew, influencing international perspectives on disability. The British social model, developed in the late twentieth century, distinguished between impairment (biological conditions) and disability (social barriers) (Owens et al., 2015). Oliver et al. (2013) emphasised social barriers, such as stereotyping and discrimination, and advocated for systemic change. However, critics argue that this model oversimplifies disability by overlooking individual experiences and broader social

contexts (Sabatello, 2013). Although imperfect, these evolving perspectives have had a significant impact on disability rights and social inclusion.

2.2. SOCIAL INCLUSION: BASIC CONCEPTS

Inclusion, like disability, lacks a universally accepted definition but is generally understood as the integration of individuals or groups into wider social structures (Cambridge Dictionary, 2025). Social inclusion addresses systemic barriers faced by marginalised groups, such as people with IDD, by implementing innovative strategies that strengthen civil society (Mulgan et al., 2007). According to Manuela Ralha, Councillor of Vila Franca de Xira Municipal Council, *Inclusion depends on a number of factors, first and foremost on the person's functional capacity and their behaviour (...) The big challenge is to change mentalities. People with disabilities have abilities, they have potential, and we have to create opportunities for them to develop these abilities and potential.* Social entrepreneurship plays a critical role in translating these innovations into actionable solutions, particularly in disability services, strengthening community participation and resilience (Taylor et al., 2020). Social entrepreneurship fosters cross-sectoral collaboration, integrating public, private and non-profit efforts to drive systemic change (Krlev et al., 2023). Inclusive education is an example of social innovation, integrating students with special educational needs (SEN) into mainstream classrooms with the necessary support. Programmes such as Associação Empresários para a Inclusão Social (EPIS) address educational inequalities (Carvalho & Viseu, 2024). Community participation improves quality of life (Amado et al., 2013), while social attitudes, skills development and confidence building reduce barriers to inclusion (Abbott & McConkey, 2006). Interactions promote inclusion (Rossetti & Keenan, 2017), but students with SEN are at higher risk of exclusion (Pijl et al., 2008). Workplace initiatives such as Australia's buddy systems support social inclusion (Cavanagh et al., 2017) are also important to reduce some prejudice against people with IDD in work environments. The success of inclusive efforts depends greatly on the design of the environments in which they occur. *Empathetic and flexible environments support inclusion, while settings that require fast-paced interactions or are ill-prepared for individual needs tend to foster exclusion*, states Ana Isabel Dias, psychomotrician in CERCIOEIRAS.

Disability-focused non-profit organisations are key drivers of social innovation, bridging marginalised communities with broader social systems. They co-develop solutions and advocate for equity and accessibility (Mion et al., 2023). Their adaptability and mission-driven focus enable them to effectively address complex challenges (Taylor et al., 2020). A growing trend in nonprofit innovation is digital advocacy, where influencers with IDD use online platforms to challenge stereotypes and promote inclusion (Bonilla-del-Río et al., 2022). Increased digital visibility fosters community and disrupts traditional disability

narratives (White et al., 2020). Nonprofits also increase digital literacy, ensuring that people with disabilities have access to education, employment, and civic life (Khanlou et al., 2021). As stated by the Advisor of the Ministry of Infrastructure and Housing, which employs an individual with IDD, *Technology is seen as a valuable tool for inclusion, provided it is adapted to individual needs*. As digital tools become progressively integrated into educational and social programmes, it is essential to ensure that their potential is matched with adaptability to individual cognitive and functional profiles. In addition, they play a critical role in policy advocacy, using data-driven approaches to shape inclusive policies (Gen et al., 2020). Through community engagement and creativity, these organisations are driving systemic change and promoting more inclusive societies (Gelfgren et al., 2022).

2.3. CURRENT PRACTICES THROUGH THE WORLD

Non-governmental organisations (NGOs) play an essential role in addressing global social, economic and environmental challenges. They promote advocacy, welfare and development in areas such as health, education, human rights and disaster relief. Operating independently of governments, NGOs engage communities through knowledge and innovative strategies to drive change (Lewis et al., 2020). International NGOs promote inclusion by addressing structural inequalities and promoting equal opportunities in education, employment and community participation. They work with governments, businesses and educational institutions to implement inclusive policies and ensure that people with IDD and their families are empowered to advocate for themselves (Rimmerman, 2013). Advocacy campaigns challenge stereotypes through public awareness initiatives and direct support programmes, helping individuals to access mainstream services. Inclusion International exemplifies this mission by defending the rights of people with IDD and promoting their full inclusion in education, employment and society. By removing barriers to participation, NGOs ensure systemic change and greater equity (Tilley et al., 2020). Global organisations promote the inclusion of people with disabilities through a variety of strategies. Special Olympics¹ uses sport to build confidence and educate communities. Human Rights Watch² fights discrimination by pushing for policy changes under the convention on the Rights of Persons with Disabilities (CRPD)³. Unequal access to resources persists, with UNICEF⁴ focusing on early

¹ Special Olympics International (<https://www.specialolympics.org/stories/news/special-olympics-international-and-education-cannot-wait-join-forces-to-advance-inclusion-through-sports-and-physical-education-in-emergency-and-protracted-crisis-settings>)

² Human Rights Watch (<https://www.hrw.org/about-us>)

³ Convention on the Rights of Persons with Disabilities (<https://www.ohchr.org/en/instruments-mechanisms/instruments/convention-rights-persons-disabilities>)

⁴ UNICEF (<https://www.unicef.org>)

intervention and caregiver training in developing countries. Leonard Cheshire Disability⁵ promotes independence in the UK through vocational programmes and advocacy. These initiatives, which include sports, cultural events and advocacy, work together to create a fairer world (Annex 1).

Best Buddies International (BBI), founded in 1989 by Anthony Kennedy Shriver, is committed to the inclusion of people with IDD. Its core mission is to cultivate genuine relationships and empower individuals to contribute meaningfully to their communities. Over 35 years, BBI has expanded globally (Figure 1).

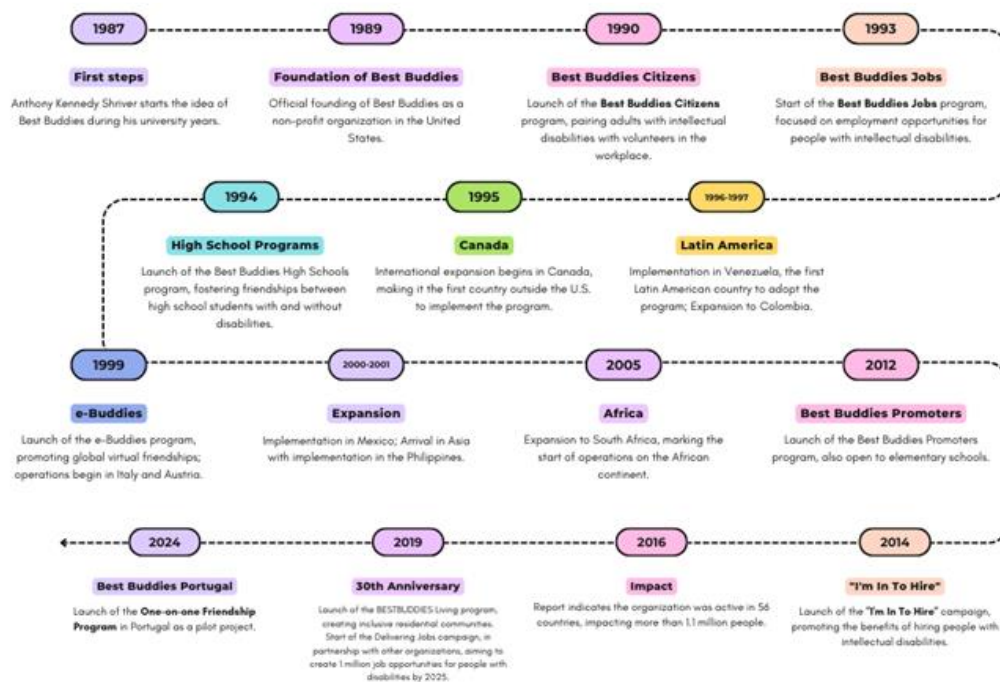


Figure 1: Best Buddies Timeline. Source: Own Elaboration.

BBI provides critical support to its affiliates through comprehensive project management and staff training. These initiatives ensure that local programmes are effectively aligned with BBI's mission. Regular training and meetings equip staff with essential tools and knowledge. This structured support promotes consistency, builds local team capacity and addresses challenges. BBI's efforts aim to maximise community impact and promote inclusive societies (Annex 2).

BBI's unique approach combines global reach with local impact, promoting social inclusion for people with IDD. Its diverse programmes develop vital soft skills such as public speaking and self-advocacy, leading to measurable outcomes such as increased employment, demonstrating a transformative impact on communities.

⁵ Leonard Cheshire Disability (<https://www.leonardcheshire.org/about-us>)

2.4. CURRENT STATUS OF SOCIAL INCLUSION IN PORTUGAL

The prevalence of disability in Portugal is 10.9% (Censos, 2021), affecting more women and increasing with age. Mobility impairment is the most common (6.1%), followed by visual impairment (3.5%), cognitive impairment (3.4%) and hearing impairment (2.8%). There are also difficulties with self-care and communication. Educational attainment is lower among people with disabilities, with 64.7% having completed basic education (ODDH, 2023). This leads to challenges in employment. People with visual impairments have the highest employment rate (17.5%), while people with mobility impairments have the lowest (7.1%). These statistics highlight the disparities in education and employment for people with disabilities in Portugal.

Portugal's disabled population faces significant inequalities (ODDH, 2023). 8% live in collective housing compared to 1.5% of the general population. 68.1% of people with reduced mobility do not have accessible housing. Commuting participation is low at 3.2% of the total, with only 13.3% of disabled adults commuting for work or education. The risk of poverty is high: 62.3% before social transfers and 31.4% with severe disabilities after, compared to 16.7% for non-disabled people. Almost a third of households with disabled family members struggle with daily expenses. These statistics underline the need for targeted policies to promote inclusion and accessibility. *The miracle solution for me would be more support for parents who have children with these kinds of cognitive deficits, so that they can manage their lives better and give the best to their children,* states Marina Pignatelli, parent of an individual with IDD.

Portugal faces challenges in the inclusion of people with IDD due to societal attitudes, infrastructure and research gaps. 30.5% of IDD households are at risk of poverty/exclusion, compared to 18.8% in general (European Commission, 2021). This disparity hinders employment and community participation. Stigma persists, limiting access to education and opportunities (Alves et al., 2020). Despite awareness, social and professional environments often remain exclusionary. Fragmented research hinders effective policy development. Addressing these issues requires targeted interventions to promote inclusion and overcome economic and social barriers.

Portugal's Modelo de Apoio à Vida Independente (MAVI)⁶ and Estratégia Nacional para a Inclusão de Pessoas com Deficiência (ENIPD)⁷ initiatives signal a commitment to the inclusion of people with IDD, but inequalities remain. Future strategies need to strengthen cross-sectoral collaboration, allocate resources to inclusive education and employment, and improve monitoring. Societal barriers, including fragmented research and policy

⁶ Modelo de Apoio à Vida Independente (<https://www.inr.pt/vida-independente>)

⁷ Estratégia Nacional para a Inclusão de Pessoas com Deficiência (<https://www.inr.pt/documents/11309/284924/ENIPD.pdf>)

inconsistencies, coupled with infrastructural limitations, hinder progress (Pinto et al., 2021). While MAVI and ENIPD address some issues, implementation gaps remain. Overcoming these will require commitment, innovative thinking and a shared vision for an equitable society, leveraging digital platforms and addressing systemic barriers. Despite legal frameworks in place, many families still struggle to access meaningful support. As one interviewee parent of an individual with IDD, Isabel Guimarães, observed, *State support is minimal or nonexistent, and even worse, it is not easily accessible.*

Cross-sector partnerships that integrate employment with digital training can empower people with IDD (Borges et al., 2021). However, research on inclusion in Portugal lacks coordination, which hinders scalable solutions. Siloed approaches between sectors lead to resource inefficiencies (Silva et al., 2021). NGOs play a crucial role, implementing programmes based on international best practices or innovative local initiatives to improve the quality of life of people with IDD (Silveira-Maia et al., 2019). Strengthening collaboration and coordinating research is essential for effective social innovation and inclusion.

Portugal has a rich history of social inclusion, exemplified by Santa Casa da Misericórdia de Lisboa (SCML)⁸, which has provided comprehensive care for centuries. Centros de Recuperação Adaptados (CERCIs)⁹ provide essential support for people with IDD, using an ecological model. Specialist organisations such as the Associação Portuguesa de Síndrome de Asperger (APSA)¹⁰ and the Associação Portuguesa de Trissomia 21 (APT21)¹¹ address specific needs and provide specialised support. Employment initiatives such as Vila ComVida's¹² Café Joyeux¹³ and SEMEAR¹⁴ create inclusive workplaces that promote financial independence and social inclusion. Associação Projecto Jovem¹⁵ and Elo Social¹⁶ also support people with disabilities through various programmes. Despite these efforts, fragmented services highlight the need for a coordinated approach (Annex 1). However, digital platforms offer considerable potential. Bonilla-del-Río et al. (2022) highlight digital advocacy tools that enable people with IDD to share their stories and build networks. This promotes empowerment and visibility,

⁸ Santa Casa da Misericórdia de Lisboa (<https://scml.pt>)

⁹ Centros de Recuperação de Crianças Inadaptadas (CERCIs) (<https://www.fenacerci.pt/fenacerci/movimento-cerci/>)

¹⁰ Associação Portuguesa de Síndrome de Asperger (<https://www.apsa.org.pt/pt/>)

¹¹ Associação Portuguesa de Trissomia 21 (<https://appt21.org/>)

¹² Associação Vila ComVida (<https://vilacomvida.pt>)

¹³ Café Joyeux (<https://joyeux.pt>)

¹⁴ SEMEAR (<https://www.semear.pt/about-us>)

¹⁵ Associação Projeto Jovem (<https://associacaoprojectojovem.com>)

¹⁶ Elo Social (<https://www.elosocial.org>)

demonstrating Portugal's ability to harness social innovation for the inclusion of people with IDD.

2.5. POLICIES, LEGISLATIVE FRAMEWORK, AND BARRIERS TO INCLUSION

Portugal is promoting inclusion of people with IDD through MAVI, presented in the Decree-Law No. 129/2017¹⁷, ENIPD 2021-2025 and CRPD principles. MAVI enables autonomous living through personalised assistance and Centros de Apoio à Vida Independente (CAVI), moving from institutional to community support. Co-funded by the European Structural and Investment Funds¹⁸, it emphasises self-determination and empowers beneficiaries to control their support plans, in line with international law. This initiative promotes social inclusion by breaking patterns of dependency, as described in CRPD, European Funds and the Decree-Law 129/2017.

Portugal's ENIPD 2021-2025, in line with the CRPD and the European Disability Strategy¹⁹, prioritises autonomy, employment and education. It emphasises collective responsibility for inclusion. Employment gaps persist despite improvements (ODDH, 2023), highlighting discrimination and accessibility challenges.

Education policies promote inclusion, but Decree-Law 54/2018²⁰ has been criticised for insufficient teacher training and resources. *We don't invest in inclusive education and we end up with groups of disabled children who spend most of their time in one classroom. We see that this inclusion is just about space. It's not efficient inclusion*, highlights Ana Castro Santos, Technical Director from Associação Vila ComVida & Café Joyeux. Also stated by Duarte Correia, psychomotrician in CERCIOEIRAS, *True inclusion goes beyond simply placing people with intellectual disabilities in mainstream settings*. These critiques highlight a recurring challenge in the Portuguese educational system, where the concept of inclusion is frequently reduced to mere physical co-location, rather than focusing on meaningful participation, reinforcing the argument that true inclusion requires structural investment and pedagogical reform.

Compliance with the CRPD is crucial, but implementation gaps exist, as reports to the Committee on the Rights of Persons with Disabilities²¹ highlight issues of intersectional discrimination. While employment rates for persons with IDD have increased, challenges remain. Advocacy groups call for stronger monitoring and the voices of persons with

¹⁷ Decree-Law No. 129/2017 (<https://diariodarepublica.pt/dr/detalhe/decreto-lei/129-2017-108265124>)

¹⁸ European Structural and Investment Funds (https://ec.europa.eu/commission/presscorner/detail/en/ip_23_389)

¹⁹ European Disability Strategy 2021-2030 (https://employment-social-affairs.ec.europa.eu/policies-and-activities/social-protection-social-inclusion/persons-disabilities/union-equality-strategy-rights-persons-disabilities-2021-2030_en)

²⁰ Decree-Law 54/2018 (<https://diariodarepublica.pt/dr/detalhe/decreto-lei/54-2018-115652961>)

²¹ Committee on the Rights of Persons with Disabilities (<https://www.ohchr.org/en/treaty-bodies/crpd>)

disabilities in policy-making (Ferri et al., 20-22). Effective implementation of policies, with adequate resources and training, remains essential for true inclusion.

Finally, advocacy and policy reform remain vital. By addressing gaps in existing frameworks and ensuring consistent funding for inclusion initiatives, stakeholders can create a more supportive environment for social innovation to thrive. Efforts to align policies with the lived experiences of people with IDD can ensure that social innovation directly addresses their needs and aspirations (Alves et al., 2020).

This literature review highlights that the social inclusion of people with IDD is a complex yet essential area of social innovation and policy development. Significant progress has been made in promoting inclusive policies, improving educational frameworks and fostering community engagement. However, social stigma, systemic barriers and economic inequalities continue to limit full participation. *One of the main barriers to true inclusion in Portugal is ignorance. In fact, there are still many people who, due to lack of information or ignorance, are afraid to interact with people with IDD*, highlights Filipa Pinto Coelho, President of Associação Vila ComVida & Café Joyeux. Social entrepreneurship, community-driven initiatives and digital advocacy have a critical role to play in closing these gaps and promoting empowerment, autonomy and equity. Achieving meaningful inclusion requires cross-sectoral collaboration, increased public awareness and responsive policy reforms. Future research should improve evaluation methods, scale up successful practices and overcome socio-cultural barriers to inclusion, as sustained efforts are crucial to build inclusive societies.

3. PROJECT DEVELOPMENT

3.1. METHODOLOGY

This chapter outlines the methodological framework of the research, detailing the approaches, techniques, and tools used. It presents key findings and data analysis, interpreting results, and assessing their broader impact. The discussion connects these findings to the project's objectives and their relevance to the wider field. Notably, AI, particularly ChatGPT, helped in improving the project, mainly in organizing content. Linguistically, it corrected grammar and enhanced readability. This structural and linguistic support elevated the quality of the final document. This methodology examines BBI adoption in Portugal using a mixed-methods approach. It combines: i) literature analysis; ii) quantitative insights from national statistical data and BBI reports; as well as iii) qualitative data collection. These methods, enhanced by artificial intelligence and ethical standards, provide a credible basis for analysis. Multiple data sources capture the program's complexity and potential impact. The research, structured in four interconnected phases, ensures a well-rounded evaluation of BBP's implementation and its impact in the society.

3.1.1. PHASE 1 – LITERATURE REVIEW

The literature review concentrated on a wide range of publications and scholarly articles that explore key themes such as social inclusion, disability advocacy, and the implementation of related programs and initiatives across diverse cultural and organizational settings. These sources were carefully selected to provide a broad perspective on the topics at hand, examining both theoretical frameworks and practical applications. The review aimed to synthesize existing research to build a thorough understanding of the complex issues surrounding social inclusion for individuals with disabilities, while also identifying effective strategies and best practices from various international contexts. Furthermore, the analysis of these documents sought to uncover potential challenges and barriers that may arise when adapting such initiatives to the unique socio-cultural and organizational dynamics of Portugal.

3.1.2. PHASE 2 – QUANTITATIVE DATA COLLECTION

The quantitative data collection involved a thorough and systematic analysis of data obtained from several reputable sources of national and international statistics. Key among these were reports and datasets from the Instituto Nacional de Estatística (INE), which provides comprehensive national demographic and socio-economic data, as well as insights into the disability landscape in Portugal. The research also used data from the Observatório da Deficiência e Direitos Humanos (ODDH), an important institution

dedicated to monitoring and advancing disability rights and inclusion in the country. Additionally, data from BBI, a global organization focused on promoting social inclusion for individuals with intellectual and developmental disabilities, was included to provide a broader, international perspective on disability advocacy and inclusion.

3.1.3. PHASE 3 – PRIMARY DATA COLLECTION METHOD

The primary data collection method consisted of semi-structured interviews (Annex 3)) conducted with four key groups: i) professionals working in organizations focused on social inclusion and/or individuals involved in political decision-making; ii) members of the broader Portuguese society, including family members of the individuals with Intellectual and development disability (IDD); iii) individuals with or without IDD taking part of the BBP first friendship pilot; and iv) representatives from BBI. This diverse sample was selected to capture a wide range of perspectives on the needs of the IDD individuals, the possible program's implementation in Portugal and its potential societal impact. The interviews for this study were conducted using a variety of methods to accommodate the preferences and availability of the participants. These included in-person interviews, video conferencing sessions, and telephone calls, ensuring flexibility in how participants could engage in the research process. Each interview was recorded with the explicit consent of the participants, ensuring that their contributions were accurately captured for later analysis. This dual approach allowed for a greater understanding of the participants' responses.

3.1.4. PHASE 4 – DATA COLLECTED INTEGRATED HARMONIZATION

The findings from the literature review and quantitative data are carefully integrated with the results from the interviews, which are part of the Primary Data Collection Method, to create a comprehensive and contextual backdrop for interpreting the entire set of collected data. Artificial intelligence tools like ChatGPT enhanced the methodology by organizing ideas, refining language, and identifying patterns in data. They ensured consistency, streamlined analysis, and improved the study's overall quality and rigor. The incorporation of various types of data provided a comprehensive understanding of the research problem, enabling a more in-depth analysis that considered both broad trends and individual experiences. By weaving together diverse data sources, the research was able to present a well-rounded, evidence-based perspective, strengthening the validity of the conclusions and recommendations drawn from the study.

3.1.5. JUSTIFICATION OF THE METHODOLOGICAL APPROACH

The methodological choices made for this master's project were strategically aligned with the goal of developing a comprehensive and context-sensitive business plan for the implementation of Best Buddies in Portugal. The integration of literature review,

quantitative analysis and qualitative interviews through a mixed-methods approach ensured a multidimensional understanding of the social, institutional and cultural dynamics surrounding IDD. The literature review established a theoretical foundation, to critically evaluate global best practices in social inclusion and disability advocacy, and to contextualize them within the Portuguese context. Quantitative data from authoritative national and international sources, including the INE, ODDH and BBI, provided empirical evidence to support needs assessment and strategic planning. Concurrently, qualitative interviews yielded nuanced insights into stakeholder perspectives, enabling the project to reflect real-world challenges and expectations. The diverse range of voices involved in the process, including policymakers, families, and individuals with IDD, contributed to the formulation of a business plan that is both socially responsive and practically grounded. The integration of artificial intelligence tools, particularly ChatGPT, further strengthened the methodological framework by supporting organisation, linguistic clarity, and consistency throughout the project.

4. BEST BUDDIES PORTUGAL : ROADMAP FOR THE FUTURE

This chapter will focus on Best Buddies Portugal (BBP) and its development throughout 2024. It will examine the organisation's key initiatives, growth strategies and the success of its program. In order to gain a vision of its current position and future potential, a SWOT analysis of the programme will be presented. Based on this analysis, a detailed business plan will be elaborated, outlining strategic objectives and actions aimed at increasing the organisation's reach and effectiveness in promoting inclusion and friendship for people with intellectual and developmental disabilities.

4.1. BEST BUDDIES PORTUGAL FRAMEWORK

In 2024, BBP has formalized its relationship with BBI by signing a protocol. This agreement states Portugal's commitment to adhering to BBI operational and ethical standards, including the implementation of prescribed program guidelines and maintaining a consistent approach to project delivery. The protocol also includes financial obligations, stipulating that BBP will pay a fee to the BBI once it begins to secure funding for its initiatives and being a sustainable organization. This fee contributes to the sustainability of the global network, supporting Best Buddies' ongoing efforts to provide resources and oversight to its affiliates worldwide. The organization began to operate, in Portugal with a primary focus on its Friendship Program, which is central to its mission of creating meaningful one-to-one relationships between individuals with and without disabilities. The initiative also seeks to promote leadership development, raise awareness about inclusion, and establish sustainable community engagement practices tailored to Portugal's unique cultural and social context. The implementation of BBP was deeply personal for some families, motivated by the desire to foster authentic relationships. As Maria Castro e Almeida, one of the representatives of the BBP management team and mother of a participant in the pilot group reflected *Recognizing the lack of meaningful social experiences, our family helped bring Best Buddies to Portugal to create opportunities for genuine friendship and inclusion.*

In March 2024, BBP launched the first group for the Friendship Program. The group was made up of 14 pairs of people with (Buddies) and without (Peer Buddies) IDD, 14 girls and 14 boys. They were paired according to gender, age and common interests by the responsables for running the project. Participants commit to stay in touch regularly, whether through phone calls, text messages, or in-person meet-ups. By building these relationships, the Best Buddies Friendship Program benefits everyone involved. *Being with my Peer Buddy all the time and being able to go out with her made me get out of the house and do different things and learn new things. I really like it when we talk because we have so many things in common,* says Pilar Santos Silva, one of the Buddies from the

first group. Having these connections, buddies gain confidence, a sense of belonging, and meaningful social relations, while Peer Buddies develop empathy and a deeper understanding of diversity. *I feel happy and valued, and I really the connection between me and my Buddy*, says Carmo Reis Pereira, another Buddy from the program. Together, these friendships help create more inclusive communities, breaking down stereotypes and fostering a culture of respect and acceptance. *I've learned that for a person with autism, friendship is about understanding and acceptance. This is a central point. When you show even a little understanding and kindness, it can quickly help someone adjust their behaviour. They stop feeling abnormal. This makes all the difference in building a connection and moving forward together from there*, affirms João Cancela, parent of a participant in the BBP pilot project.

In July 2024, I attended the Best Buddies Leadership Conference (BBLC) in Bloomington, Indiana with my brother António, a Best Buddies Portugal participant. The conference focused on leadership development and provided workshops on advocacy, public speaking, and inclusive program adaptation. The BBLC highlighted different implementation challenges and facilitated cross-cultural dialogue with Best Buddies representatives from around the world. We learned that the US model needs to be localised for different cultural contexts. The collaborative discussions fostered global partnerships to increase programme impact by sharing best practices and developing innovative solutions. The experience was transformative, deepening our commitment to inclusion and advocacy. It highlighted the importance of cultural understanding in addressing global challenges. We gained actionable knowledge and an international network, strengthening our resolve to advance Best Buddies' mission in Portugal. The conference reaffirmed our commitment to this work by emphasising the role of collective action and strategic innovation in creating an inclusive world. This was also a great experience for António, since he *really liked to go abroad to know how Best Buddies works in the United States and to make friends from different countries*.

In December 2024, BBP partnered with Colgate for a volunteer event at Banco de Bens Doados to benefit Entrajuda²². The event brought together Buddies, Peer Buddies and Colgate employees in a collaborative effort to support the community. Participants prepared package for distribution and listened to a Buddy and Peer Buddy duo share their experiences in the Best Buddies programme. Their heartfelt stories highlighted the transformative power of inclusive friendships, reinforcing the programme's mission and inspiring participants. The collaboration exemplified inclusive volunteering by integrating participants into mixed teams. This fostered an environment of equal contribution and celebrated diversity. The simple task of preparing packages emphasised

²² Entrajuda (<https://www.entrajuda.pt>)

teamwork, mutual support and the joy of giving back. This successful initiative has encouraged BBP to expand similar partnerships, creating mutually beneficial opportunities for companies to engage in team building and corporate social responsibility while promoting inclusion. The event demonstrated the impact of collaborative efforts in building inclusive communities and reinforcing the values of empathy and shared responsibility. Beyond creating friendships, these initiatives shift community perceptions. As António Reis Pereira, parent of one of the participants from the pilot group, noted *Participating in initiatives such as Best Buddies helps raise awareness in the community that people with IDD are capable.*

Besides the one-to-one meetings, during 2024 BBP organized four group meetings: i) a night out to Santos Populares, in June; ii) a picnic in Belém; iii) a dinner in McDonald's, where one of the Buddies from the program works; and iv) a trip to the cinema, offered by NOS, to see the film *Campeones 2*, which tells the story of an adapted basketball team and their adventures as a team made up of people with IDD. Although the intention was not to raise money for future projects, these interactions not only build friendships but also create a broader sense of community and inclusion. *I believe Best Buddies teaches other people the value of friendship*, notes Manuel Vinhas, one of the Buddies. These friendships often extend beyond the program's structured activities and become deeply personal, which is the main goal of the organization. As Gonçalo Pinto, one participant, shared, *One of the best moments for me was when Diogo came to my birthday. It made the day really special.*

In February 2025, BBP took an important step forward by launching another group of its Friendship Program. With the establishment of this new group, BBP aims to extend its reach, providing more participants with opportunities to connect, grow, and experience a sense of belonging, improving on what went wrong in the first group, coming up with a strategy for a better expansion of the project. Best Buddies received almost 50 applications from people with and without IDD, from all over Portugal, interested in taking part on the program. The enthusiasm from those involved has driven growing interest across the country. *I think Best Buddies is really cool. I tell everyone they should join because it's so much fun making new friends!*, affirms Matilde Lucena, one of the Buddies from the first One-To-One Friendships group.

BBP has not yet begun receiving a lot of funding, and therefore, its financial contributions to BBI have not commenced. Despite this, the organization remains actively engaged in upholding the principles outlined in the protocol and working towards securing the necessary resources to expand its programs. This collaboration ensures that Portugal is well-positioned to scale its operations effectively while maintaining the high standards

expected within the BBI network. This ongoing relationship underscores the commitment to fostering a more inclusive society through dedicated support and strategic alignment.



Figure 2: Events organised/represented by Best Buddies Portugal: a) Launching of the friendship pilot group 2024, b) summer picnic; c) BBLC 2024 with BBI CEO Anthony Kennedy Shriver; d) Colgate volunteers session

As the organization prepares to expand its program, the organization is highly aware of the responsibilities that come with managing an additional group. Fundamental to these efforts is the effective management and support of the volunteers who are essential to the program's success. With this in mind, BBP is placing a stronger emphasis on ensuring that volunteers are well-equipped, engaged, and committed to their roles. *After they've been trained, interviewed and properly assessed, they will be matched*, says Monica Moya, Director of International Operations and Programs at BBI. To address these concerns, is prioritizing enhanced training and support for its volunteers. The organization plans to implement onboarding sessions and workshops designed to prepare volunteers for their responsibilities within the Friendship Program, that will focus on key areas such as understanding the unique needs of individuals with IDD, effective communication techniques, and strategies for resolving conflicts in a positive and inclusive manner. *Commitment and taking the role seriously are essential. These friendships are key to understanding mutual support*, Mariana Albergaria, a participant from the pilot group emphasizes. This commitment must be approached with the necessary seriousness, and the training of volunteers is an essential aspect of this process. The training ensures that volunteers are equipped with the knowledge and skills to respond effectively to challenging situations, demonstrating their commitment to the cause.

Despite its overall success, the pilot faced challenges: inconsistent commitment from peer buddies, communication difficulties between buddies, and geographical barriers that necessitated pair changes. BBP made progress in 2024, promoting inclusion of people

with IDD through programmes and collaborations. *I have never realized how important it is for people unfamiliar with IDD to participant in initiatives that promote inclusion*, affirms José Ribeiro da Cunha, one of the Buddies without IDD. These initiatives transformed the lives of people with IDD, cultivated empathy and positively impacted society, guaranteeing that BBP continues to innovate to ensure sustainable growth and greater impact.

4.2. SWOT ANALYSIS AND STRATEGIC GOALS AND OBJECTIVES

The definition of a SWOT analysis (Figure 2) is essential for a strategic planning, as it is used to assess the Strengths (S), Weaknesses (W), Opportunities (O), and Threats (T) associated with an organization, project, or business venture. It offers a structured approach to evaluating internal and external factors that influence the success of a specific goal or initiative.

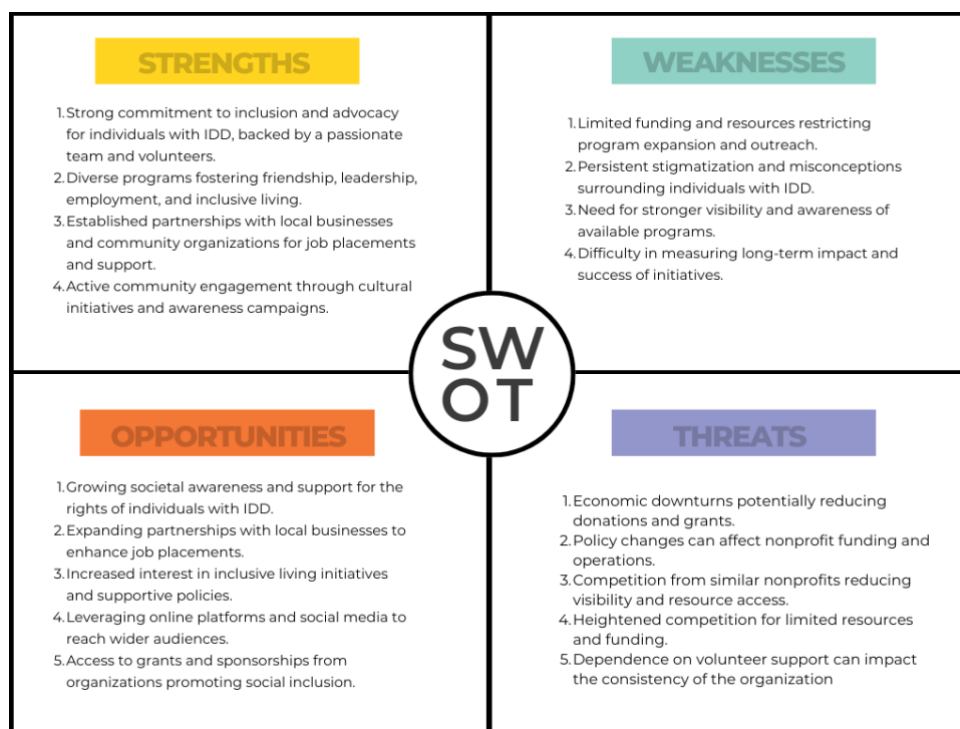


Figure 3: SWOT Analysis for Best Buddies Portugal Vision Plan.

By examining these elements in the context of Best Buddies' work and the Portuguese environment, the SWOT analysis facilitates informed decision-making, aids in setting clear objectives, and helps develop strategies that leverage strengths, address weaknesses, capitalize on opportunities, and mitigate potential threats. Based on the SWOT analysis, Strategic Goals and Objectives (Figure 3) were defined to better build the Best Buddies Portugal implementation plan, to know what should be prioritized in the next five years. The SWOT analysis and strategic goals outline a clear path for the organization to amplify its impact on individuals with IDD. By leveraging strengths such as a dedicated team,

diverse programs, and robust community engagement, and pursuing opportunities like forming partnerships, increasing social media activity, and securing grants, the organization will certainly growth.

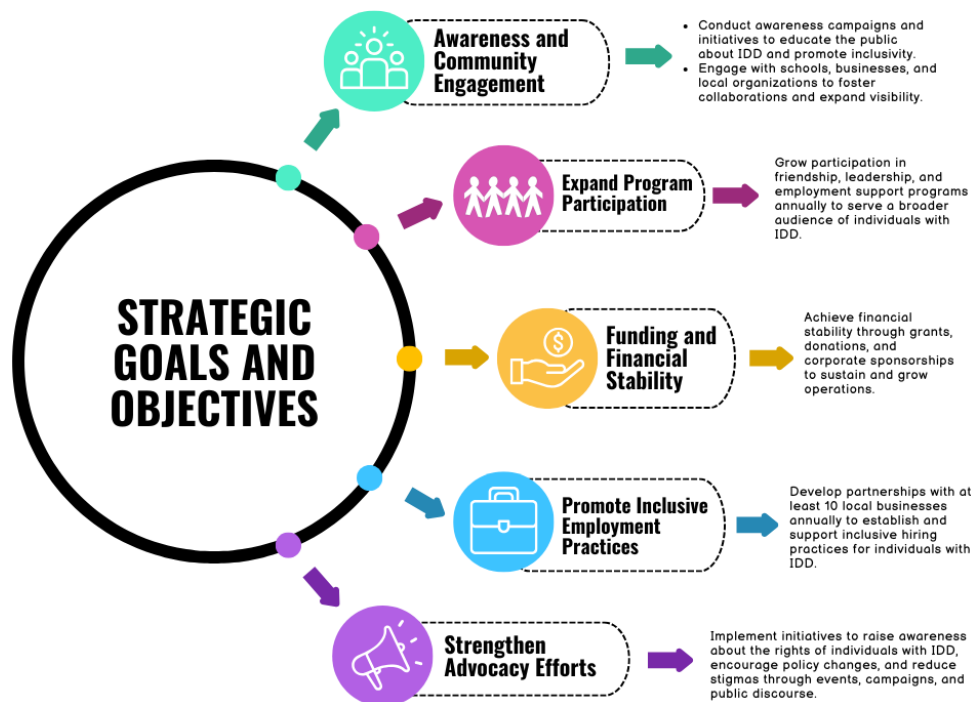


Figure 4: Strategic Goals and Objectives for Best Buddies Portugal Five Year Vision Plan

4.3. STRATEGIC PLAN PROPOSAL

The next five years represent an opportunity for BBP to strengthen its mission, expand its work and impact, and foster sustainable growth. As an organisation committed to creating opportunities for people with IDD, this Strategic Business Plan outlines the vision for growth and excellence by focusing on three key pillars: Governance, Communications and Finance. A strong governance framework is essential for BBP to ensure transparency, accountability and effective decision making. The initial focus will be on the establishment of a solid foundation, followed by the adoption of adaptive governance practices to meet evolving needs. Financial sustainability is key to BBP's growth, with strategies to improve existing approaches and introduce innovative fundraising methods, including events, merchandising, partnerships and grants. It is also important to define a strong communications plan to support engagement efforts, starting with mission-aligned messaging and expanding through social media to strengthen brand awareness and community support. Each one of the three key pillars is divided in: short-term (one year), medium-term (three years) and long-term (five-plus years) milestones. Finally, monitoring frameworks are proposed to provide feedback and ensure continuous improvement of the organisation and its initiatives.

4.3.1. GOVERNANCE STRATEGY

Regarding governance, BBP should start by defining the Governance Model they want to follow, which should be The Carver Board Governance Model²³ (see Annex 5). This is the most suitable for nonprofits due to its clear separation of roles, emphasizing strategic oversight while empowering the CEO with operational control, prioritizing mission-driven outcomes, accountability, and efficient decision-making, essential for nonprofit success through the roles presented in Table 1.

Table 1: Organizational Structure for Best Buddies Portugal

Role	Responsibilities
Board Chair	Leads board meetings, ensures strategic direction, and liaises with the CEO. Represents the organization publicly.
Vice Chair	Supports the Chair and steps in during their absence. Helps oversee committees and special projects.
Secretary	Manages board documentation, meeting minutes, and legal compliance.
Treasurer	Oversees financial planning, budgeting, audits, and reports to the board on financial health.
Governance Committee	Develops board policies, monitors performance, and ensures adherence to the Carver model.
Program Impact Committee	Evaluates the effectiveness of programs (e.g., Best Buddies Friendship and Jobs programs).
Communication Committee	Leads public relations, social media, and community engagement to promote Best Buddies' mission. Ensures brand consistency and oversees communication strategies for outreach and impact.
Fundraising & Partnerships Committee	Leads fundraising efforts and develops partnerships with local businesses and sponsors.
Advocacy & Community Engagement Committee	Promotes awareness, advocates for inclusion, and strengthens community ties.
Board Members (General)	Provide strategic input, support fundraising efforts, and serve on committees.

The board focuses on policymaking and impact measurement, ensuring transparency and donor confidence. Compared to other models, Carver provides stronger governance without micromanagement, since nonprofits can enhance this model with advisory

²³ *Board governance models: 5 examples of the most prominent frameworks.* (n.d.-b). <https://www.diligent.com/resources/blog/examples-board-governance-models>

committees. Overall, the Carver model ensures effective leadership, mission alignment, and sustainable growth, making it ideal for nonprofit organizations.

Furthermore, the formalization of partnerships with local businesses, schools, and community organizations is fundamental to leverage the community engagement with BBP. These partnerships will provide essential support for program goals, such as friendship-building activities and job opportunities, contributing to the continuous development of the One-to-one Friendships. Collaboration with other stakeholders and the development of partnerships with companies will ensure the program's objectives are met and create a network of community allies committed to fostering inclusion. This is also an opportunity to create partnerships to develop the Integrated Employment pillar, connecting with enterprises and other organizations to promote job opportunities to individuals with IDD taking part on the BBP programs. To guarantee effective governance and long-term success, BBP must adopt a monitoring and evaluation framework for its one-to-one friendship program. It includes regular progress reports, participant feedback, surveys on friendship quality and impact, and follow-up meetings to track well-being and address emerging challenges through staff support.

Simultaneously, the organisation should establish clear performance metrics to measure program success. It is imperative to utilise metrics such as the number of participants enrolled, retention rates, and the level of awareness raised through outreach and community engagement efforts, in order to provide tangible benchmarks against which to track progress and inform continuous improvement efforts. This integrated approach is expected to facilitate enhanced accountability, promote evidence-based decision-making, and ensure the long-term effectiveness and impact of the programme.

Additionally, training for staff and volunteers will be prioritized to ensure alignment with program goals and an understanding of the unique needs of individuals with IDD. It was one thing that missed in last year's pilot group, and by equipping team members with the skills and sensitivity required, BBP will build a resilient support system that can deliver impactful services.

Training programs must include workshops on inclusion, communication, and program-specific operations, with specialized people in the subject of IDD, creating a cohesive and empowered team, as you can see in Annex 6. One of the main objectives is to start by implementing these training sessions with the One-to-one Friendship Program group that started in February 2025.

Looking to the medium term, in the next three years, BBP must scale its efforts to deepen its impact and expand its reach. Governance must evolve to include regional expansion, which will support program implementation in various areas across Portugal, other than

Lisbon, through a new committee named Expansion Committee. *Engaging local leaders and tailoring programs to communities will help the expansion of the organization in Portugal*, highlighted Lexie Appleby, International Regional Director for Best Buddies International. This decentralized approach will enable the organization to address local needs more effectively and foster greater community involvement.

Periodic evaluations of programs should be conducted to ensure they remain aligned with the organization's mission and goals, constantly identifying strengths and areas for improvement, so it maintains a dynamic and adaptive approach. Also, it is recommended that, by this time, BBP already has its own income to pay workshop trainers and administrative staff, to guarantee the structure and sustainability of the organization.

To encourage leadership within the organization, a mentorship program must be established. This initiative will identify and support future leaders, ensuring the sustainability of the organization's mission. By investing in the professional growth of its team, both of individuals with and without IDD, BBP will create a pipeline of skilled leaders capable of leading the organization toward future success, implementing the Leadership Development pillar.

In the long term, five years and beyond, governance strategies should focus on establishing a wider international collaboration network with other Best Buddies Chapters, in events or the development of policies. These partnerships will enable the exchange of best practices, resources, and innovative ideas. Additionally, BBP members should be able to attend the annual BBLC, to connect with other Best Buddies chapters from all over the world and take part in international initiatives as the YLC. It is also important to evaluate the programs at the end of the five years to see what should be kept and what could be improved.

After this, and only when the other pillars are in place and well-established, should a detailed analysis be carried out with the various committees to understand how to start thinking about the inclusive living pillar, where the first residence should be built, what the benefits and obstacles are of implementing this pillar in Portugal.

4.3.2. COMMUNICATION STRATEGY

The proposed communication strategy focuses on promoting inclusion and showcasing the impact of its programs through targeted social media campaigns, local events and social channels. Table 2 presents the main actions to develop a strong Communication Plan, with Key Performance Indicators (KPIs), to measure impact, track progress, and guide strategic decision-making through the communication strategy.

Table 2: Communication Plan

Timeline	Objective	Key Actions	KPIs
Short-Term (1 year)	Boost brand visibility & community engagement	- Create Facebook, TikTok and LinkedIn profiles - Create a website - Improve the Instagram account - Launch targeted awareness campaigns on social media & local events - Highlight the benefits of inclusion & program impact - Share powerful testimonials & buddy stories - Find Celebrity Ambassadors who represent the mission	- Follower growth - Engagement rates - Volunteer sign-ups - Website traffic
Medium-Term (3 years)	Strengthen partnerships, community involvement & advocacy	- Establish partnerships with schools, local businesses & media - Launch advocacy campaigns to influence policy changes - Organize large-scale events & volunteer programs	- Number of partnerships - Advocacy milestones - Event attendance - Policy changes influenced
Long-Term (5 years)	Scale impact, secure sustainability & lead IDD advocacy	- Launch a mobile app for community engagement - Develop long-term fundraising strategies - Position BBP as the leading IDD advocacy organization	- Funds raised - Mobile app adoption - National recognition - Donor & volunteer retention rates

The proposed communication strategy, based on BBI guidelines, aims to maximize the organization's visibility and outreach through multiple channels. Annex 7 outlines diverse content for each phase of the communication timeline. A calendar is recommended to plan social media posts and ensure timely dissemination, including commemorative dates and events. A good and clear communication is essential to raise awareness, engage the community, and promote the organization's mission of inclusion. It also plays a key role in attracting donors, volunteers, and partners. By delivering clear messages, the strategy supports wider outreach, stronger relationships, and sustainable organizational growth.

4.3.3. FINANCIAL STRATEGY

The financial strategy is designed to ensure the organization's sustainability, transparency, and efficiency in managing its resources. This strategy focuses on creating a balanced financial framework that supports BBP's mission. By establishing clear financial guidelines, the organization should focus on optimizing fundraising efforts, effectively allocate resources, and maintain financial stability, ensuring that all initiatives align with the organization's core values and long-term objectives.

To provide a comprehensive overview of the organization's financial management, this strategy includes a detailed table outlining projected income and expenses. The income section will cover various funding sources, such as donations, sponsorships, grants, and fundraising events, while the expenses section will categorize operational costs, program funding, and administrative expenses. This approach ensures transparency, empowering stakeholders to comprehend the financial flow within BBP, facilitating informed decision-making and guarantees that every euro contributes directly to advancing the organization's mission. As outlined in Table 3, a variety of fundraising opportunities can be developed to support income for BBP. These opportunities feature diverse methods to engage donors, maximize participation, and increase overall contributions, including a brief description, target audience, and potential benefits to assist in planning effective campaigns.

Table 3: Fundraising Opportunities

Category	Opportunities
Corporate & Community Partnerships	Develop local business sponsorships and matching gift programs.
Recurring Fundraising Campaigns	Launch a monthly donor program and peer-to-peer initiatives.
Signature Events	Organize annual events (Gala, Friendship Walk, Benefit Concert).
Merchandise & Awareness Campaigns	Develop branded merchandise and social media campaigns.
Grants & Institutional Giving	Apply for EU social development grants and global funding opportunities.

These ideas are designed to cater to different fundraising goals and strategies. They include community events, online platforms, and corporate partnerships. They serve as a practical guide to inspire creative and impactful fundraising efforts (Annex 8). Tables 4, 5, and provide a detailed overview of income and expenses, respectively.

The income table outlines various revenue sources, while the expenses table breaks down costs across operational areas. Together, they highlight the balance between funds raised and expenditures incurred.

Bearing in mind that some of the costs presented are only for the initial period and knowing that over time the amounts raised will increase as the organization becomes better known and more visible, we can expect a large increase in funds to ensure the sustainability of BBP. These values were chosen to reflect the realities of the nonprofit landscape in Portugal, particularly for a newly launched organization like BBP.

Table 4: Sources of Income (Estimate per year)

Category	Source	Amount (€)	Justification
Fundraising & Donations	Individual Donations	5,000	Individual giving in Portugal tends to be modest. A new NGO without national visibility may struggle to raise more than this amount.
	Crowdfunding Campaigns	2,000	Crowdfunding is growing in Portugal but still limited in reach for causes outside crisis/health contexts.
	Annual Gala Event	10,000	For a new NGO, attracting more than this level of support from a gala may not be feasible without strong sponsors.
	Best Buddies Membership Fees	3,000	A realistic number based on modest annual fees (e.g. €10–€25 per member).
Program Revenue	Training, Workshops & Team Building for Companies	2,000	Training services take time to develop and attract paying institutions.
	Merchandise Sales	2,000	Without established brand recognition, merchandise sales typically generate limited income at launch.
	Community Events	3,000	Community events can generate small-scale donations or entry fees
Total Income		27,000	

In contrast to the funding environments and philanthropic cultures found in countries like USA and UK, the Portuguese context is typically more conservative, both in terms of individual giving and corporate engagement. Although Corporate Social Responsibility (CSR)²⁴ initiatives exist in Portugal, they tend to be smaller in scale and are often directed towards well-established organisations with a significant media presence or national visibility. Consequently, newer NGOs often struggle to secure financial support during their early years. *To improve inclusion, policymakers must prioritize increased funding, diversified services, and community-based solutions that extend beyond institutional care*, stated Ricardo Rodrigues, Director of Santa Casa da Misericórdia de Lisboa, confirming that Portugal's philanthropic infrastructure remains less developed—especially for newer or less prominent NGOs. In addition, in-kind donations are an important part of BBP resource strategy. These non-monetary contributions, such as goods and services, significantly reduce operational expenses and improve programme delivery.

²⁴ Portal do Governo. (n.d.). *Promover a responsabilidade social*. <https://www2.gov.pt/en/inicio/espaco-empresa/guia-a-a-z/cid-2-faseneg-1-promover-a-responsabilidade-social>

Table 5: Expenses (Estimate per year)

Category	Item	Amount (€)
Operational Costs	Office Rent & Utilities	12,000
	Salaries & Benefits	24,000/employee
	Office Supplies & Equipment	2,500
	Insurance & Legal Fees	2,000
	Marketing & Advertising	2,000
Program Expenses	Volunteer Training & Support	7,500
	Events & Activities	2,000
	Transportation Costs	1,000
	Technology & Software	3,000
	Educational Materials	2,000
	Best Buddies Leadership Council	800 + flight/participant
Fundraising Expenses	Gala Event Costs	3,000
	Crowdfunding Promotion	200
	Merchandise Production	1,000
Communication Plan & Expenses	Social Media Campaigns	300
	Email Marketing	300
	Press Releases & Media Outreach	300
	Website Maintenance & SEO Optimization	200
	Promotional Videos & Storytelling Content	200
	Printed Materials (Flyers, Brochures)	500
Total Expenses		64,800

Through partnerships with local businesses, community members and service providers, BBP can secure resources that directly support its mission, including venue spaces for events, technology, transportation and professional services. This approach lowers the organisation's dependency on cash funding and fosters a strong sense of community involvement.

Table 6 outlines the potential in-kind donations that BBP could receive annually, alongside their estimated values and justifications. These estimates are based on practices among similar non-profits and reflect realistic estimates for a growing organisation. By receiving non-monetary contributions, which might include food, venue spaces, technology, and professional services, BBP has the potential to reduce operational costs while maintaining the quality and reach of its programmes. These resources also enable

the organisation to allocate a limited financial capital towards strategic growth and capacity-building, while also fostering robust community partnerships.

Table 6: Financial Support In-kind (Estimate per year)

In-Kind Donation Type	Revised Annual Value (€)	Justification
Food and Beverages for Events	2,000	Modest community events with donated snacks/meals from local caf��s, supermarkets or restaurants (e.g., Continente, Pingo Doce, McDonald's).
Event Decorations	500	Basic materials donated by local party stores or volunteers.
Office Supplies	1,000	Donations of basic materials from small businesses or bulk purchases provided by sponsors.
Transportation Services	3,000	Occasional support from companies (e.g., UBER voucher partnerships or municipal transport support) rather than a full transportation program.
Venue Spaces for Events	2,000	Free or discounted community centers, municipal halls, or coworking spaces (ex: Dona Ajuda)
Professional Services (Legal, Accounting)	2,500	Pro bono contributions from individual professionals or small firms, not yet large-scale partnerships (ex: .
Technology Equipment	2,000	Donated laptops or tablets from CSR programs (like "TechSoup" Portugal or corporate refurbishers).
Promotional Materials	1,000	Printing donated or discounted by local print shops or sponsored via graphic design volunteers.
Training Materials and Workshops	2,000	Shared or open-source materials, and workshops led by volunteers or academic partners.
Merchandise for Fundraising	800	Donated items from artisans or small businesses to support raffles/auctions.
Total	16,800	

Table 7 summarizes the financial balance by comparing total income—including in-kind donations—with total expenses. It offers a clear snapshot of Best Buddies Portugal's financial sustainability and supports informed decision-making for future planning.

Table 7: Final Balance (Estimate per yer)

Description	Amount (€)
Total Income	27,000
Total Expenses	64,800
Final Balance	-37,800

It is usual for newly established organisations to report a negative surplus at the conclusion of their first year of operations. This is due to the fact that initial investments

in operations, staffing, and program development frequently surpass the income generated during the early stages of business. In the case of Best Buddies Portugal, a projected final balance of -€37,800 reflects this natural startup phase.

However, the utilisation of in-kind contributions, encompassing donated venues, professional services, and materials, has been demonstrated to result in a substantial reduction in expenses and a narrowing of this gap. In order to enhance its financial equilibrium and transition towards a positive surplus, BBP should concentrate on the expansion of community partnerships, the fortification of corporate sponsorships, and the diversification of income streams through events, merchandise, and grant applications. As the organisation gains visibility and credibility, both monetary and in-kind support are likely to increase, helping to stabilise and strengthen its financial position in the following years.

To ensure financial stability and support long-term growth, BBP must follow a multi-phased budget management strategy. This approach focuses on short-term sustainability, medium-term growth and long-term financial resilience, ensuring that the organization remains adaptable in a dynamic funding landscape. BBP needs to focus on immediate financial stability by tracking monthly expenses and securing sponsorships from local businesses and donors.

Fundraising events such as the Annual Gala and crowdfunding campaigns will increase liquidity, and strengthening social media and donor outreach will increase engagement, while regular financial reviews can ensure operational efficiency. In the medium term, the organisation should expand its fundraising efforts through monthly donor programmes, peer-to-peer initiatives and deeper corporate partnerships. Investments in technology and data analytics will streamline operations.

In addition, continued development of social media through storytelling will increase visibility and donor engagement while diversifying revenue streams. Long-term goals should include building an endowment and financial reserves for sustainability. A comprehensive plan can guide financial growth while exploring new revenue streams such as partnerships, grants and branded merchandise. Expanding the donor base and securing multi-year funding will surely support long-term programme growth.

Financial sustainability is a fundamental element for the resilience and continuity of third-sector organizations, including Best Buddies Portugal. Although it is a non-profit organization, the generation of annual financial surpluses should not be viewed as a commercial objective, but rather as a tool for stability and the strengthening of its social mission. In reality, any profit generated at the end of the year should be reinvested in strategic areas that enhance the organization's impact and ensure its long-term sustainability, including:

1. Training for volunteers and mentors: Developing and implementing training programs for volunteers who support individuals with intellectual or developmental disabilities, ensuring the quality of the friendship relationships and mentorship programs.
2. Program development and expansion: Continuous improvement and potential scaling of existing initiatives, such as the “Friendship Program” or the “Jobs Program,” aiming to reach a larger number of beneficiaries across different regions of the country.
3. Public communication and awareness: Investment in communication campaigns, social media outreach, events, and educational materials that promote inclusion and challenge the stigma associated with intellectual disabilities.
4. Creation of financial reserves: Building financial reserves that act as a safety net to respond to unexpected funding shortfalls, ensuring the continuity of essential services.
5. Direct support to participants: Funding for costs associated with the active participation of individuals with disabilities in organizational activities, such as transportation, meals, or materials for workshops and training.
6. Organizational development: Strengthening the organization’s technical and administrative capacity, including internal training, acquisition of digital management tools, and improvement of physical infrastructure—all aimed at increasing operational efficiency and mission impact.

The examples provided illustrate that the profits generated are not a deviation from Best Buddies Portugal's social mission, but rather a means to fulfil it. The reinvestment of annual surpluses is consistent with best practices in the management of social sector entities, thereby contributing to financial autonomy, good governance, and the sustainable creation of social value.

It is crucial that the ability to generate and manage surpluses is regarded as an essential component of a robust organisational strategy, thereby ensuring that Best Buddies Portugal continues to effectively and sustainably promote the social inclusion of individuals with intellectual and developmental disabilities in Portugal.

The organization’s focus on governance, communication and finance settles the foundation for its mission of empowerment and inclusion. Through effective leadership development and financial sustainability, it fosters inclusion and provides opportunities for those with IDD to thrive. Clear and impactful communication spreads awareness and builds strong relationships with supporters and partners, aiming to expand the organization outside the niche where it is settled. By driving these efforts, the organization

creates a society that not only celebrates diversity but also values the unique contributions of every individual, ensuring that inclusion and empowerment become integral aspects of the community's culture and progress.

To effectively evaluate the work developed by BBP in promoting the social inclusion of people with IDD it is essential to use comprehensive feedback frameworks that emphasize impact assessment (Annex 9), continuous improvement and stakeholder engagement. These frameworks provide structured approaches to analyzing program effectiveness, measuring social outcomes and ensuring alignment with the organization's mission to promote inclusion and friendship. From social impact assessment models to multi-stakeholder feedback collection tools, each framework offers unique insights into program performance and areas for development.

5. CONCLUSIONS & FUTURE RECOMMENDATIONS

This MFW highlights the crucial role of social innovation in the inclusion of people with disabilities. It shows that meaningful participation requires a multi-dimensional approach that blends global practices with local culture and community strategies. Analysing the potential of Best Buddies revealed the transformative power of inclusive initiatives.

The research emphasises strategic planning, community engagement and sustainable development for the well-being of people with IDD. It highlights the need to overcome persistent stigma and systemic barriers through social entrepreneurship and policy reform. Using a mixed-methods approach, the study captured the nuances of implementing Best Buddies in Portugal, providing a holistic understanding of its potential and challenges. This research highlights the need for tailored strategies for effective social inclusion. As a result, the recommendations provided are well supported and practical, taking into account the multifaceted nature of implementing the Best Buddies programme. This approach not only deepened the understanding of the programme's impact, but also highlighted strategies for promoting inclusive communities in Portugal.

The establishment of BBP represents a significant contribution to the national nonprofit sector, addressing a critical yet frequently disregarded aspect of inclusion: the facilitation of meaningful social relationships. While many Portuguese organisations prioritise education, employment, or care for individuals with intellectual and developmental disabilities (IDD), BBP focuses on fostering long-term friendships between people with and without disabilities. This targeted approach directly combats social isolation, a persistent issue in Portugal despite legal advancements, and promotes emotional well-being, self-confidence, and a stronger sense of belonging. The BBP model, which has been extensively evaluated on a global scale, serves to complement existing services by promoting community integration and enhancing the overall quality of life for its participants. Another key characteristic of BBP is its empowerment-focused programs. The scope of BBP extends beyond the domain of peer friendships, encompassing leadership development through the Ambassador Program. This initiative facilitates the role of individuals with IDD as advocates and role models, empowering them to make a positive impact on their respective communities. The organisation also engages youth and corporate volunteers, who are typically less involved in disability-related causes in Portugal. This broadens societal awareness and reduces stigma. It is therefore reasonable to conclude that it acts as both a service provider and a catalyst for cultural change. Its presence can strengthen Portugal's third sector by filling a critical gap, reinforcing existing efforts, and offering a new model for inclusive community building.

The implementation of BBP has demonstrated the transformative potential of inclusive programmes in promoting social change. The organisation's commitment to creating

meaningful friendships, promoting leadership development and raising awareness of inclusion has laid a solid foundation for long-term impact. The successful launch of the 2024 Friendship Programme, the establishment of strategic partnerships and active participation in international conferences have strengthened the organisation's position and expanded its reach. These initiatives have not only increased the social participation of people with IDD, but have also fostered empathy, leadership and community engagement among participants without disabilities.

The SWOT analysis revealed BBP's strengths: dedicated team, community involvement and global focus. Weaknesses included volunteer management, financial sustainability and visibility. Opportunities included partnerships, social media and fundraising, while threats included economic changes, stigma and competition for funding. In addition, adapting global practices to the Portuguese context was seen as crucial. While BBI provides a strong foundation, cultural, social and economic factors require localisation. Tailoring programme delivery, effectively engaging communities and addressing specific challenges were essential. This approach respected cultural nuances and increased programme relevance and sustainability.

The resulting strategic plan focused on governance, communications and finance. Strengthening governance, promoting transparency and building partnerships were priorities and improved communication, particularly through social media, aimed to increase awareness and support. Diversified funding, including grants and sponsorships, ensured financial stability. This localised strategy ensures that BBP resonates with the Portuguese community, maximising its impact and long-term viability.

The study highlights the persistent barriers that people with IDD face in education, employment and community engagement as a result of societal attitudes and systemic inequalities. BBP's pillars - friendship, employment, leadership, housing and family support - provide a framework for meaningful inclusion, fostering belonging and self-worth. Volunteer management is critical to BBP's Friendship Programme. Building meaningful relationships between participants requires effective recruitment, training and ongoing support. To sustain volunteer engagement and build inclusive communities, BBP must invest in comprehensive training, mentoring and fostering a culture of empathy and respect. Addressing these challenges through BBP's comprehensive approach is essential to promoting social inclusion. In the words of Ana Louseiro, a psychomotor rehabilitation technician from Ginásio Clube Português, who works with some of the participants of the BBP pilot project, *True inclusion is about enabling people with IDD to participate in all areas of their lives – from work to the social sphere.*

Community involvement and cross-sector collaboration are essential. BBP's partnerships with businesses and schools are critical to expansion, and strengthening these

collaborations will improve inclusive environments across Portugal. BBP's success depends on adapting, innovating and scaling programmes while maintaining its mission. The strategic plan provides guidance, but ongoing evaluation and feedback are essential. Evidence-based practice, ethical integrity and community empowerment position BBP to lead in disability inclusion. Sustainable change requires unified individual, organisational and governmental efforts and the long-term impact of BBP will be determined by its ability to foster these relationships. The strategic business plan provides a roadmap for achieving these goals, but ongoing evaluation, stakeholder engagement and community feedback will be essential to refine strategies and ensure sustainable impact. The organisation's commitment to evidence-based practice, ethical integrity and community empowerment positions it as a leader in disability inclusion and social innovation.

In addition to contributing to academic research on social inclusion and disability studies, this master's thesis offers practical recommendations for policy makers, non-profit leaders and community advocates. By highlighting the successes and challenges of implementing Best Buddies in Portugal, this study provides valuable insights for other countries and organisations seeking to promote social innovation and advance the rights of people with IDD. The journey of BBP reflects the transformative power of community-driven initiatives to promote inclusion, break down barriers and create opportunities for people with IDD to thrive. Through strategic planning, ethical research and a commitment to social justice, this project has laid the foundation for meaningful change and a more inclusive society. As BBP aims to grow and evolve, it serves as a beacon of hope and a model of how dedicated effort, collaboration and compassion can create a world where everyone is valued, included and empowered to reach their full potential.

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ANNEXES

ANNEX 1: Current Practices in International and Portuguese NGOs

NGOs address global issues and advocate for marginalised groups such as people with IDD. Operating independently, they drive social change through community engagement and innovation. International NGOs reduce inequalities by ensuring equal access to education and employment. They work with governments and institutions to create inclusive policies and strengthen advocacy. Sport, cultural initiatives and community activities foster social connections, building understanding and trust. These strategies promote inclusion and empower people with IDD to participate fully in society.

Special Olympics International enables individuals with IDD to discover their strengths through sport, promoting inclusion and community education. Health care, competition and community engagement are improved through sports programmes. Human Rights Watch exposes systemic discrimination through research. They push governments to enforce disability rights under the CRPD, amplifying the voices of persons with disabilities to drive policy reform. There are global disparities in access to inclusive education, health care and early intervention. UNICEF addresses this, particularly in developing countries, through early intervention and community-based support. They train caregivers and educators to ensure sustainable impact. Leonard Cheshire Disability empowers people with IDD through vocational training, advocacy workshops and community initiatives. These programmes build confidence and enable active participation in society. Through civic engagement and rights advocacy, people with IDD challenge societal barriers.

These and many other organisations around the world make a important contribution to the inclusion of people with IDD and their complementary missions advance global equality and opportunity.

Portugal, despite some resource limitations and misinformation, is committed to the inclusion of people with IDD. Increased awareness is driving various inclusion initiatives and local NGOs are growing to provide tailored support, prioritising autonomy, skills development and social integration. These localised efforts demonstrate the potential for creating inclusive environments. Santa Casa da Misericórdia de Lisboa (SCML), a venerable Portuguese institution with over five centuries of history, champions social inclusion and well-being. Recognized for its administrative public utility, SCML upholds core social values through proximity, respect, and advocacy. SCML provides comprehensive services, including residential care, healthcare, and rehabilitation, catering to diverse needs, notably individuals with IDD. Its specialized centers support children, youth, adults, and families. Committed to sustainability and social innovation, SCML collaborates with social economy leaders, aligning with the UN's 2030 Agenda.

Through entrepreneurship and innovation, it addresses contemporary social challenges, particularly fostering inclusion for individuals with IDD, strengthening community cohesion.

In the 1970s, one of the biggest institutions responsible for tackling the challenges associated with individuals with IDD emerged. Centros de Recuperação de Crianças Inadaptadas (CERCIs)²⁵ are part of a social solidarity movement, which seeks to resolve this differences in society between people with and without IDD. Created by technicians and people concerned about this problem, CERCIs provide services as establishing special education schools, to break away from traditional assistance models and focusing on meeting the developmental needs of children with disabilities. Initially, they were aligned with the Education branch and focused on its development due to limited alternatives. Over the years, CERCIs expanded their scope, leading to the establishment of the Social Solidarity Cooperative Branch in 1998 under Decree-Law 7/98. This new framework was imperative for the recognition of the diverse and innovative interventions of CERCIs in local social services. Now, these institutions provide a broad range of services, including vocational training, occupational support, residential care, early intervention, and family and home support. Their approach is guided by an ecological model, which “emphasize the environmental and policy contexts of behavior, while incorporating social and psychological influences” (Sallis et al., 2015) and addressing various age groups and degrees of disability to promote inclusion and independence.

There are several other initiatives that emphasize tailored assistance for individuals with with IDD by offering a variety of resources and specialized programs, such as Associação Portuguesa de Síndrome de Asperger (APSA)²⁶ and Associação Portuguesa de Trissomia 21 (APT21)²⁷, focusing on individuals with Asperger's and Down Syndrome. The goal in both organizations is to foster understanding and address their unique needs and promote their rights and inclusion. Programs include educational workshops designed to enhance communication skills, social interaction, and coping mechanisms. These workshops are complemented by support groups where individuals and families can share experiences, gain insights, and receive emotional support.

There are also initiatives focused on providing training and conditions for integrating people with IDD into the job market. As well as helping their participants get as close as possible to financial independence, they help them develop a sense of responsibility, self-esteem and commitment to the work they do. This is the role of Vila ComVida²⁸, through its program Café Joyeux²⁹. A standout feature is the establishment of inclusive

²⁵ Centros de Recuperação de Crianças Inadaptadas (CERCIs) (<https://www.fenacerci.pt/fenacerci/movimento-cerci/>)

²⁶ Associação Portuguesa de Síndrome de Asperger (<https://www.apsa.org.pt/pt/>)

²⁷ Associação Portuguesa de Trissomia 21 (<https://appt21.org/>)

²⁸ Associação Vila ComVida (<https://vilacomvida.pt>)

²⁹ Café Joyeux (<https://joyeux.pt>)

workplaces, such as cafés or retail spaces, where individuals with disabilities can work in supportive environments. Through these efforts, the initiative demonstrates the capabilities and potential of these individuals, challenging societal stereotypes. Public awareness campaigns accompany these employment programs to encourage other businesses to adopt inclusive hiring practices, thereby fostering workplace diversity and societal integration.

Programs focused on helping them transition into adulthood with confidence and independence also emphasize social integration by building interpersonal and life skills. These vocational training programs are tailored to each participant's abilities and interests, enabling them to find meaningful employment or engage in fulfilling activities.

SEMEAR³⁰ is another Portuguese NGO that promotes the employability and socio-professional integration of young adults with intellectual and physical disabilities. It offers certified training in the agro-food sector, focusing on organic farming and sustainable agriculture. Participants engage in activities such as sowing, planting, harvesting, and soil management, developing personal and professional skills. The program collaborates with various organizations to create inclusive responses that improve the quality of life for individuals with disabilities in Portugal. SEMEAR also offers corporate volunteer programs, allowing companies to participate in agricultural activities alongside program participants. These initiatives aim to strengthen team spirit, promote cohesion, and enhance social responsibility within organizations. Additionally, SEMEAR provides fresh, organic vegetable baskets prepared by participants, which can be delivered to customers' homes.

In Associação Projecto Jovem³¹, they are dedicated to supporting young people with mental and/or motor disabilities aged 16 and over, through personal growth activities, such as art therapy, sports, and group projects, which are incorporated to enhance self-expression, confidence, and social connections and prepare these individuals to a more independent life. The initiative also provides mentorship opportunities, pairing young individuals with role models, called mentors, to guide them through their personal and professional development.

Other organizations, like Elo Social³², also work through a similar approach to support young and adult individuals with mental disabilities, ensuring their autonomy and inclusion in society. This specific initiative includes holistic structured training programs aimed at fostering independence in daily living, such as budgeting, cooking, and navigating public transportation. Inclusive activities help participants build social connections and develop a sense of belonging. Besides, residential support is also available for those who need a safe, structured living environment, with staff providing

³⁰ SEMEAR (<https://www.semear.pt/about-us>)

³¹ Associação Projecto Jovem (<https://associacaoprojectojovem.com>)

³² Elo Social (<https://www.elosocial.org>)

guidance and assistance as required and protected employment opportunities allow participants to work in settings that respect their needs, providing a sense of purpose and financial independence.

These NGOs play an essential role in advocating for and implementing inclusive practices for individuals with IDD in Portugal, contributing significantly to a more inclusive society. However, despite their impactful work, many operate independently, leading to fragmented efforts, which presents an opportunity for a unifying approach.

ANNEX 2: Best Buddies International

Best Buddies is a non-profit organisation dedicated to promoting inclusion and opportunities for individuals with IDD. Its main goal is to build a world where people with IDD can make real connections, contribute to their communities and live full lives.

Best Buddies International plays a critical role in supporting its affiliates through comprehensive project management support and staff training initiatives. These support mechanisms are designed to increase the efficiency and effectiveness of local programmes and ensure that they are in line with BBI's mission to promote inclusion and opportunities for people with intellectual and developmental disabilities. Through regular training sessions and regular meetings, BBI equips staff with the tools, knowledge and strategies needed to successfully implement programmes. The organization works on achieving its success by the development of the four main pillars established: One-to-one Friendships, Integrated Employment, Leadership Development and Inclusive Living. Most recently, the organization implemented a new pillar, named Family Support.



Best Buddies Five Mission Pillars. Source: Own elaboration.

In 2023, the organization made a significant impact, engaging 137,346 participants across its diverse programs and initiatives. *Best Buddies' one-to-one friendship programs* remain central to its mission. These initiatives prioritize meaningful relationships between individuals with and without IDD, breaking down social barriers and promoting inclusion. Best Buddies supported 3,535 chapters throughout the year, fostering inclusion across all educational levels (Elementary school, Middle school, High school and College) and after leaving school (Citizens and e-Buddies), around the 50 states of the United States of America and 46 other countries. Besides in person initiatives, e-Buddies, one of One-to-one Friendship programs that allows friendships to develop through an

online scheme, enabling people who find it more difficult to travel - due to their condition or geographical location - to take advantage of the programme.

Regarding the *Jobs Program*, in 2023, the program successfully placed several participants in meaningful jobs,. The program also offers a pre-employment and vocational training, including resume building and interview preparation, coupled with ongoing job coaching, ensuring the success of the participants in their jobs. The organization's Jobs Program demonstrates significant employment outcomes, with 3,177 participants, 2,093 employed, and an 87.28% U.S. retention rate. Participants work flexible hours, averaging 20.33 weekly, and the program operates in 20 states, with potential for further expansion. Benefits like retirement plans and paid leave are common, though access to medical coverage and 401(k) plans³³, an employer-sponsored, defined-contribution, personal pension account, is limited. Jobs Program excels in achieving high employment and retention rates, with top earners receiving comprehensive benefits that highlight career growth opportunities. Employers are actively engaged, creating inclusive workplace environments and demonstrating the value of workplace diversity. The roles offered are integrated in industries such as retail, hospitality, and technology, empowering participants, helping them develop skills as responsibility and commitment to the work, also helping them to achieve financial independence.

Leadership Development in other of the main domains of the organization, empowering individuals with IDD to advocate for themselves and others. Participants gain numerous skills, as public speaking, self-advocacy, and community engagement. Elementary schools lead in chapters and participants, highlighting a focus on younger age groups. The Ambassadors and Transitions Programs extend impact beyond schools, promoting advocacy and life-stage support. Limited college-level participation indicates an opportunity to develop targeted strategies for greater engagement in higher education levels.

The *Inclusive Living* initiative is an example of BBI need to and vision of creating an inclusive society. In 2023, the organization operated five residences located in Washington, D.C. (2), Miami, FL, Atlanta, GA, and Los Angeles, CA. Today, Best Buddies already has ten residences, and one more ready to launch at the end of the year 2025. These communal housing environments allow individuals with and without disabilities to live together, fostering mutual understanding and teaching essential life skills such as budgeting, cooking, and time management.

³³ 401(k) Plans (<https://www.irs.gov/retirement-plans/401k-plans>)

The new pillar, *Family Support*, is extremely important in empowering individuals with IDD. Families are often the first and most enduring source of love and encouragement, offering a foundation of support that fuels participants' growth in confidence, independence, and resilience. The first step to become advocates in the mission of promoting inclusion is to accept the child's condition. Beyond emotional support, families often act as advocates, raising awareness and breaking down societal barriers for inclusion. By engaging families, Best Buddies builds a powerful partnership that bridges the program's efforts with real-world application.

Events such as the Best Buddies Friendship Walk and Best Buddies Challenge campaigns engaged communities and raised funds and awareness about the importance of inclusion, through the gathering of the community. The organization's robust chapter network, comprising high schools, middle schools, elementary schools, and colleges, provided essential support for its initiatives. One additional important initiative is the Youth Leadership Council (YLC) of Best Buddies. It is a team of dedicated student leaders who are committed to promoting inclusion and advocating for individuals with IDD. The council plays a crucial role in supporting Best Buddies' mission by fostering friendship, leadership, and opportunities for people with IDD. Through their work, YLC members raise awareness about the importance of inclusion within schools and communities, while also serving as role models who inspire others to embrace diversity and kindness. The Best Buddies Leadership Conference (BBLC) is a globally significant annual event organized by BBI, gathering participants from diverse cultural, social, and geographical backgrounds, including students, educators, volunteers, and individuals with and without IDD. The main goal of the conference is to inspire, educate, and empower attendees to become effective advocates for inclusion and social equity.

Best Buddies secures its impact through diverse funding streams, including donations, corporate partnerships, grants, and high-profile fundraising events like galas and endurance challenges, like the State Showdown, which is a fundraising competition between states, or the Champion of the Year. Transparency and donor engagement are central to its strategy, ensuring trust and continued support. Best Buddies stands out among NGOs promoting social inclusion for individuals with IDD due to its multifaceted approach. With a wide range of initiatives and programs to offer and by combining a global reach with a localized impact, focuses on developing several soft skills focus like public speaking and self-advocacy ensures sustainable change, while measurable outcomes, like successful employment placement, highlight its transformative impact on participants and communities.

ANNEX 3: Interview scripts

a) Organization's Employees

1. How do you define the true social inclusion of people with intellectual disabilities today?
2. What are the biggest barriers that hinder the social inclusion of people with intellectual disabilities?
3. Can you share an example of a successful program or initiative that has promoted the inclusion of people with intellectual disabilities?
4. In which social contexts or activities do people with intellectual disabilities feel most included, and in which do they face the most exclusion?
5. What are the most common difficulties faced by people with IDD in social interactions?
6. Is there a limit between helping and forcing the patient to participate in social activities? How can this be balanced?
7. How do you support people with intellectual disabilities in building meaningful relationships with their peers and the community?
8. What are the most effective strategies for educating society about the importance of including people with intellectual disabilities?
9. How have technologies or innovations impacted the social inclusion of people with intellectual disabilities?
10. What changes would you like to see in social policies or services to improve the inclusion of people with intellectual disabilities?

b) Parents

1. Can you talk a bit about your son's main characteristics and what his personality is like?
2. What have been the biggest challenges you've faced since the diagnosis, and how have you dealt with them?
3. How has your child's condition impacted on your family and the day-to-day family dynamic?
4. What are your main concerns and hopes for your child's future, in terms of independence and well-being?
5. What are the greatest joys and achievements you have experienced with your child?
6. What community resources or supports (such as therapists, support programs or schools) have made a significant difference in your child's life?
7. Are you familiar with Best Buddies' initiatives? How do you think they could contribute to your child's inclusion and well-being?
8. How do you think taking part in a friendship, such as those run by Best Buddies, could benefit your child's present and future life?

c) Best Buddies Portugal Participants

1. What do you like the most about the Best Buddies Friendship program?
2. What was it like meeting your match (the volunteer/friend)? Were you excited or nervous?
3. What kind of activities do you like to do with your buddy?
4. How has the Friendship program changed your life?
5. Do you think your relationship with your friend has helped you learn or try something new?
6. What was the most fun or special moment you had with your friend?
7. Do you feel that the Best Buddies program helps people to better understand the importance of friendship?
8. What would you say to someone who is thinking about taking part in the Friendship program?

d) Best Buddies International Team

1. Can you describe the structure of Best Buddies International? How is the organization organized at the local, national, and international levels?
2. How does Best Buddies ensure consistency and quality across its various locations and chapters?
3. What kind of support and training do local chapters receive to help implement Best Buddies' mission?
4. How does Best Buddies sustain growth? Are there specific strategies for expanding to new locations?
5. How do you engage volunteers, participants, and donors in your events? Are there strategies that have been particularly effective?
6. How does Best Buddies evaluate the success of its events? What metrics are used to measure impact?
7. What are the most popular events or programs in the U.S., and why do you think they resonate with people?
8. How does Best Buddies tailor its programs to fit different communities across the U.S.? Are there specific adaptations that work well in certain areas?
9. How does Best Buddies handle advocacy in the U.S. to advance inclusion and support individuals with intellectual and developmental disabilities (IDD)?
10. What are some of the biggest challenges Best Buddies faces in the U.S., and how is the organization addressing them?
11. What do you think sets Best Buddies apart from other organizations supporting individuals with IDD?

ANNEX 4: List of interviewees

Name	Position	Organization	Date of the interview	Length of interview	Format of interview
	Advisor	Ministry of Infrastructure and Housing	February 7, 2025	30 minutes and 5 seconds	Remote
Manuela Ralha	Councillor	Vila Franca de Xira Council	November 20, 2024	43 minutes and 53 seconds	Remote
Ricardo Rodrigues	Director of the Autonomy Support Unit	Santa Casa da Misericórdia de Lisboa	December 2, 2024	47 minutes	Remote
Filipa Pinto Coelho	President	Vila ComVida & Café Joyeux	November 20, 2024	49 minutes	Remote
Ana Castro Santos	Technical Director	Vila ComVida & Café Joyeux	January 28, 2025	36 minutes	Remote
Ana Louseiro	Psychomotor rehabilitation technician	Ginásio Clube Português	November 22, 2024	50 minutes and 38 seconds	In person
Márcia Ferreira	Therapist	Diferenças	January 27, 2025	20 minutes	Remote
Ana Isabel Dias	Psychomotrician	CERCIOEIRAS	January 29, 2025	25 minutes	Remote
Duarte Correia	Psychomotrician	CERCIOEIRAS	January 29, 2025	25 minutes	Remote
Marina Pignatelli	Parent of person with IDD		November 11, 2024	19 minutes and 39 seconds	In person
João Cancela	Parent of person with IDD		January 10, 2025	15 minutes and 46 seconds	In person
Maria Castro Almeida	Parent of person with IDD		January 20, 2025	16 minutes and 17 seconds	Remote
António Reis Pereira	Parent of person with IDD		February 23, 2025	15 minutes	Remote
Isabel Guimarães	Parent of person with IDD		February 23, 2025	17 minutes and 2 seconds	Remote

Name	Position	Organization	Date of the interview	Length of interview	Format of interview
Pilar Santos Silva	Participant of the One-to-one Friendship Program	Best Buddies Portugal	December 16, 2024	36 minutes and 6 seconds	In person
António Cancela	Participant of the One-to-one Friendship Program	Best Buddies Portugal	January 10, 2025	21 minutes and 8 seconds	In person
Manuel Vinhas	Participant of the One-to-one Friendship Program	Best Buddies Portugal	January 10, 2025	11 minutes	Remote
Matilde Lucena	Participant of the One-to-one Friendship Program	Best Buddies Portugal	January 10, 2025	18 minutes	Remote
Carmo Reis Pereira	Participant of the One-to-one Friendship Program	Best Buddies Portugal	January 10, 2025	12 minutes and 13 seconds	Remote
Gonçalo Pinto	Participant of the One-to-one Friendship Program	Best Buddies Portugal	February 20, 2025	10 minutes	Remote
José Ribeiro da Cunha	Participant of the One-to-one Friendship Program	Best Buddies Portugal	February 19, 2025	16 minutes	Remote
Mariana Albergaria	Participant of the One-to-one Friendship Program	Best Buddies Portugal	February 23, 2025	15 minutes	Remote
Lexie Appleby	International Regional Director	Best Buddies International	November 22, 2024	46 minutes and 15 seconds	Remote
Monica Moya	Director of International Operations and Programs	Best Buddies International	November 22, 2024	46 minutes and 15 seconds	Remote

ANNEX 5: Governance Models

Governance Model	Description	Key Features	Suitable For
Carver Board Governance Model (Policy Board Model) ³⁴	Developed by John Carver, this model emphasizes a clear distinction between the board's policy-making role and the CEO's operational responsibilities.	- Board focuses on setting policies and strategic direction. - CEO is granted autonomy to manage day-to-day operations. - Regular communication between board and CEO to monitor progress.	Both corporations and nonprofit organizations.
Traditional Model ³⁵	The most common model where the board oversees, advises, and provides direction to management, which handles daily operations.	- Board includes internal (executive) and external (non-executive) members. - Emphasis on oversight, strategic planning, and policy setting. - Committees may be formed for specific functions like audit or compensation.	Organizations seeking a balance between board oversight and managerial autonomy.
Management Team Model ³⁶	Board members are actively involved in the organization's daily operations, often seen in startups or small companies.	- Board members have specific operational roles. - Less distinction between governance and management. - Facilitates quick decision-making and implementation.	Startups, small businesses, or organizations in early development stages.
Cortex Board Governance Model ³⁷	Focuses on the board's role in ensuring organizational compliance, risk management, and ethical integrity.	- Board prioritizes oversight of compliance and risk management. - Establishes ethical standards and monitors adherence. - Engages in strategic planning with a focus on sustainability and accountability.	Organizations in highly regulated industries or those emphasizing ethical operations.
Advisory Board Governance Model ³⁸	Consists of external experts who provide non-binding strategic advice to the organization's management.	- Members offer expertise and insights without decision-making authority. - Enhances the organization's knowledge base and networks. - Flexible structure with members serving in a consultative capacity.	Companies seeking specialized knowledge or perspectives without formal board structures.

³⁴ Carver, J. (2006). *Boards That Make a Difference: A New Design for Leadership in Nonprofit and Public Organizations* (3rd ed.). Jossey-Bass.

³⁵ Tricker, B. (2019). *Corporate Governance: Principles, Policies, and Practices* (4th ed.). Oxford University Press.

³⁶ Huse, M. (2007). *Boards, Governance and Value Creation: The Human Side of Corporate Governance*. Cambridge University Press.

³⁷ Spitzer, D. R. (2007). *Transforming Performance Measurement: Rethinking the Way We Measure and Drive Organizational Success*. AMACOM.

³⁸ Brown, W. A. (2007). "Board Development Practices and Competent Board Members: Implications for Performance." *Nonprofit Management and Leadership*, 17(3), 301–317.

ANNEX 6: Workshop and Training Ideas for Staff and Volunteers

Workshop Title	Objective	Target Audience	Format	Duration
Inclusive Communication Strategies	Enhance skills for communicating with people with disabilities.	Volunteers & Staff	Interactive Talk	2 hours
Leadership in Inclusive Communities	Train participants to become leaders in promoting inclusion.	Staff	Seminar + Activity	3 hours
Empathy in Action: Understanding Differences	Build empathy through role-play and real-life scenarios.	Volunteers	Workshop	2.5 hours
Event Planning for Inclusive Experiences	Learn how to organize accessible and inclusive events.	Staff & Volunteers	Hands-on Training	3 hours
Conflict Resolution & Peer Mediation	Equip participants with strategies to handle conflicts.	Volunteers & Staff	Role-Playing	2 hours
Buddy Pairing: Building Lasting Friendships	Explore best practices for creating successful buddy matches.	Volunteers	Group Discussion	2 hours
Digital Tools for Community Engagement	Utilize social media and tech for advocacy and inclusion.	Staff & Volunteers	Tech Workshop	2 hours
Emotional Intelligence for Better Inclusion	Strengthen interpersonal skills and emotional awareness.	Staff	Interactive Session	3 hours
Storytelling for Advocacy	Teach storytelling techniques to promote social inclusion.	Volunteers & Staff	Creative Workshop	2.5 hours
Cultural Sensitivity & Diversity Training	Address cultural diversity and promote inclusive values.	Staff & Volunteers	Training + Case Studies	3 hours

ANNEX 7: Ideas for Social Media/Communication Content

Content Idea	Platform	Objective	Frequency
Buddy Spotlight	Instagram, Facebook	Share inspiring stories of buddy pairs.	Bi-weekly
Volunteer Testimonials	Instagram Reels, LinkedIn	Highlight volunteer experiences to attract more.	Monthly
Inclusion Tips	Instagram Stories, Twitter	Educate followers on inclusive practices.	Weekly
Event Highlights & Recaps	Facebook, Instagram, YouTube	Showcase past events with photos/videos.	After each event
“Did You Know?” Facts About Inclusion	Twitter, Instagram	Raise awareness on disability and inclusion.	Weekly
Volunteer & Staff of the Month	Instagram, LinkedIn	Recognize contributions and boost morale.	Monthly
Interactive Polls & Quizzes	Instagram Stories, Twitter	Boost engagement and educate about inclusion.	Bi-weekly
Upcoming Events & Volunteer Calls-to-Action	Facebook, Instagram, Email	Inform followers about events and how to join.	As needed
Best Buddies Behind-the-Scenes	Instagram Reels, TikTok	Show daily life and planning of the organization.	Weekly
Monthly Newsletter – “Best Buddies Portugal News”	Email (Mailchimp, etc.)	Share updates, success stories, and plans. Suggested Sections: • Message from the Director - A personal note or reflection. • Event Recaps & Upcoming Events • Buddy Spotlight - • Inclusion Tips & Resources - Educational section. • Top Social Media Moments - Best posts of the month.	Monthly

ANNEX 8: Fundraising Ideas

Fundraising Idea	Description	Potential Audience
Virtual Buddy Challenge	Participants set personal challenges (walk, read, etc.) & get sponsored.	General Public & Supporters
Inclusive Art Auction	Auction artwork created by buddies and local artists.	Art Lovers & Donors
Cooking Class for a Cause	Host a live cooking class with a chef, with proceeds going to the cause.	Foodies & Families
“Pay It Forward” Coffee Campaign	Partner with local cafés to donate a portion of sales for a week.	Local Community
Buddy Book Club	Sell access to a book club, with discussions on inclusion topics.	Bookworms & Advocates
Online Raffle with Local Businesses	Partner with businesses to raffle off prizes like spa days or dinners.	Local Businesses & Donors
Virtual Escape Room or Game Night	Charge a small fee for participants to join and play.	Young Adults & Families
“Buddies Bake-Off” Competition	Organize a baking contest where people pay to vote on the best creation.	Families & Foodies
Inclusion-Themed Merchandise	Sell custom t-shirts, tote bags, or pins designed by buddies.	General Public
Silent Auction of Experiences	Auction off experiences like local tours.	Professionals & Donors
Sports Tournament	A sports day with inclusive activities such as a charity football match, charging a fee for signing up.	General Public & Local Community
Music for Buddies	Organizing a concert featuring local bands and artists, selling tickets and including a raffle or auction during intermission.	General Public & Local Community
Friendship Walk	Organizing a community walk where people with and without IDD walk together to support inclusion.	General Public & Local Community

ANNEX 9: List of important frameworks

1. Social Inclusion Assessment Tool (SiAT)³⁹ - Developed by the World Bank, this tool emphasizes the assessment of social inclusion across three domains: markets, services and spaces, with a focus on enhancing capabilities, opportunities and dignity. By using SiAT, evaluators can systematically identify who is excluded, understand the underlying causes, and develop strategies to promote inclusion within the community.
2. Theory of Change (ToC) (Connel et al., 1998) - involves mapping out the steps and conditions necessary to achieve long-term goals. For Best Buddies Portugal, this means describing how specific activities - such as friendship programs and employment initiatives - lead to desired outcomes, such as increased social inclusion and improved quality of life for participants with IDD. By articulating these links, the ToC provides a clear roadmap for implementation and evaluation, ensuring that each activity is in line with the overarching mission of social inclusion.
3. 360-degree feedback⁴⁰ - can further enrich the evaluation process. This approach gathers insights from a wide range of stakeholders, including staff, volunteers, participants and their families. Such comprehensive feedback ensures that multiple perspectives are considered, highlighting strengths and identifying areas for improvement. For example, annual satisfaction surveys of program participants and their carers can provide valuable data on program impact and areas for improvement.
4. Social Return on Investment (SROI)⁴¹ - can quantify the social value generated by Best Buddies Portugal initiatives. SROI assigns monetary values to social outcomes, providing a tangible measure of the benefits derived from programs. This analysis not only demonstrates the economic value of social inclusion efforts but also aids strategic decision-making and resource allocation. By showing the financial equivalent of social impact, SROI can effectively communicate the organization's value proposition to stakeholders and potential funders.

³⁹ *Social Inclusion Assessment Tool*. (n.d.). <https://thedocs.worldbank.org/en/doc/478071540591164260-0200022018/SiAT-Social-Inclusion-Assessment-Tool>

⁴⁰ *360 Degree Feedback: The Ultimate Guide* | Qualtrics. (2022, March 3). Qualtrics. <https://www.qualtrics.com/en-gb/experience-management/employee/360-degree-feedback/>

⁴¹ Nicholls, J., Lawlor, E., Neitzert, E., & Goodspeed, T. (2012). A guide to social return on investment.

5. Balanced Scorecard (BSC)⁴² - can be used to monitor performance across multiple dimensions: financial health, stakeholder satisfaction, internal processes, and learning and growth. For Best Buddies Portugal, this means assessing operational efficiency, the effectiveness of inclusion programs and the development of staff and volunteers. By maintaining a balanced view of these areas, the organization can ensure sustainable growth and continuous improvement in promoting the social inclusion of people with IDD.

⁴² Hasan, R. U., & Chyi, T. M. (2017). Practical application of Balanced Scorecard-A literature review. *Journal of Strategy and Performance Management*, 5(3), 87.