



Lisbon School
of Economics
& Management
Universidade de Lisboa

MASTERS IN MANAGEMENT (MIM)

MASTERS FINAL WORK

INTERNSHIP REPORT

CASA DO IMPACTO: AN INTERNSHIP AT THE LEADING PORTUGUESE SOCIAL IMPACT HUB

MANUEL GONÇALO DA COSTA GASPAR

MARCH - 2022



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Casa do Impacto: an internship at the leading Portuguese social impact hub

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ABSTRACT AND KEYWORDS

This internship report provides a summary of the activities performed during a four-month period in Casa do Impacto, a Portuguese social impact hub, part of Santa Casa da Misericórdia de Lisboa.

Initial chapters present a brief reflection on the concepts of Social Impact, Social Innovation, Social Entrepreneurship, Impact Investment and Social Impact Assessment. Comprehension of the word social and its influence on the terms guide the reflection. Compared to the traditional views on innovation, entrepreneurship and investment, the ones motivated by the ideals of social impact emphasize the positive change in the welfare of beneficiaries their endeavours bring. Profits, when available, are reinvested in the project to create more impact, which also affects the profile of investor that seeks to help social economy organizations. A short overview of the Social Economy Framework Law, studies by INE (CSES and Social Economy Sector Survey) and a report by the European Commission are used to describe the social economy sector in Portugal. Despite the tradition the sector has in the country, legislation does not acknowledge the existence of social enterprises, although organizations, such as the OECD and the EU, doing so.

Santa Casa da Misericórdia de Lisboa is a crucial member of the Portuguese social economy, through its work in social care, health, education, and culture. The organization's Department of Entrepreneurship and Social Economy and its commercial brand, Casa do Impacto, provide programs to help foster the Portuguese impact ecosystem. Casa do Impacto, a hub for social and environmental solutions, entrepreneurs, and investors, has over three years of proven results. The SDGs define the orienting values of Casa do Impacto, which drew a sustainability focused Masters in Management student to do this internship. It allowed knowledge gained during the program's courses to be applied in the several settings Casa do Impacto operates in.

KEYWORDS: Sustainable Development Goals; Social Impact; Social Innovation; Portuguese Social Economy; Social Impact Start-up incubation; Internship report.

RESUMO E PALAVRAS-CHAVE

O presente relatório de estágio sumariza as atividades realizadas durante um período de quatro meses na Casa do Impacto, um *hub* de impacto social, pertencente à Santa Casa de Misericórdia de Lisboa.

Os capítulos iniciais apresentam uma breve reflexão sobre os conceitos de Impacto Social, Inovação Social, Empreendedorismo Social, Investimento para o Impacto e Avaliação de Impacto Social. A reflexão parte da compreensão da palavra social e a sua influência nos termos. Comparativamente às visões tradicionais de inovação, empreendedorismo e investimento, aquelas que são motivadas por impacto social priorizam a mudança positiva em bem-estar dos beneficiários. Lucros, quando disponíveis, são reinvestidos no projeto, para criar ainda mais impacto, o que afeta o perfil de investidor que procura ajudar organizações da economia social. A economia social portuguesa é brevemente estudada, através da Lei de Bases da Economia Social, estudos do INE (CSES e o Inquérito do Setor da Economia Social) e um relatório da Comissão Europeia. Apesar da existência histórica do setor no país, legislação ainda não reconhece a existência de empresas sociais, ignorando as orientações de organizações como a OCDE e a UE.

A Santa Casa da Misericórdia de Lisboa é um membro crucial da economia social portuguesa, através do seu trabalho em ação social, saúde, educação e cultura. O seu Departamento de Empreendedorismo e Economia Social e a sua marca, Casa do Impacto, disponibilizam programas que estimulam o ecossistema português de impacto. A Casa do Impacto, um *hub* de soluções, empreendedores e investidores sociais e ambientais, tem três anos de provas dadas. Os ODS determinam os valores orientadores da Casa do Impacto, facto que motivou um estudante do Masters in Management a efetuar um estágio curricular. Este permitiu que o conhecimento adquirido nas unidades curriculares fosse aplicado nos vários contextos onde a Casa do Impacto se insere.

PALAVRAS-CHAVE: Objetivos de Desenvolvimento Sustentável; Impacto Social; Inovação Social; Economia Social Portuguesa; Incubação de Start-ups de Impacto Social; Relatório de Estágio

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ABBREVIATIONS

CASES: Cooperativa António Sérgio para a Economia Social

CNES: Conselho Nacional para a Economia Social

CSES: Conta Satélite da Economia Social (Social Economy Satellite Account)

DEES: Departamento de Empreendedorismo e Economia Social (of SCML)

EIT: European Institute of Innovation and Technology

EMPIS: Estrutura de Missão Portugal – Inovação Social

ESG: Environment, Social, and Governance

EU: European Union

GVA: Gross Value Added

IAPMEI: Instituto de Apoio às Pequenas e Médias Empresas e à Inovação

IEFP: Instituto do Emprego e Formação Profissional

INE: Instituto Nacional de Estatística

IPSS: Instituições Privadas de Solidariedade Social

ISEG: Instituto Superior de Economia e Gestão

MFW: Master's Final Work

MiM: Masters in Management

NAG: Núcleo de Apoio à Gestão

NGO: Non-Governmental Organization

OECD: Organisation for Economic Co-operation and Development

SCML: Santa Casa da Misericórdia de Lisboa

SDG: Sustainable Development Goals

SIA: Social Impact Assessment

SME: Small and Medium-sized Enterprises

SOL: Smart Open Lisboa

UCI: Unidade de Capacitação e Incubação

UIS: Unidade de Investimento Social

UISTC: Unidade de Inovação Social e Transferência de Conhecimento

UN: United Nations

CHAPTER 1 - INTRODUCTION

The UN's Sustainable Development Goals (SDG), launched in 2015, brought a concise and structured way to approach the problems affecting the world. In the 17 SDGs¹ and their 169 targets, the environment, populations, businesses, governments, and everything in between, get a mention on how to act to live more sustainable lives. Management practices are at the centre of the change process required for the SDGs to succeed. Companies, organizations, and institutions need to create and distribute products and services that compel clients to behave in more sustainable ways. The onus to promote positive impact might be spread across society, but it is undeniable that the promise land is closer if collectives push to reach it. Individual efforts only go so far. Needs and wants can only be met if there is a matching market offering. If there isn't one, then innovation may be the only solution. And if this endeavour tackles the SDGs, we might be witnessing the first steps of a social and environmental impact innovation, led by a social entrepreneur. All it takes is a good idea that helps society, a resilient, creative, and focused person at the helm and the support of a surrounding environment that welcomes innovations that, ultimately, and if everything goes according to the plan, will bring prosperity and better days.

As a management student, I have always considered sustainability and management as inseparable concepts. After three years of a management undergraduate degree, where I explored and became more knowledgeable on the topics that will help me be a positive changemaker, it was time to choose a master's degree. ISEG had just presented a new program, the Masters in Management (MiM). In the school's website it says in bold letters "the program's originality lies in its full alignment with the United Nations' 17 SDGs (...) the themes of sustainability, technological evolution and geopolitics and their economic contours will make these future managers able to intervene in a purposeful management" (ISEG). It was exactly what I was looking for. MiM's efforts to be groundbreaking and disruptive within ISEG, and, ultimately, in the Portuguese academic landscape, drew me to join. I ended up belonging to the MiM's first cohort.

¹ To see a list of the 17 SDGs please refer to Appendix 2 - List of start-ups, projects and solutions associated to Casa do Impacto, updated as of February 14th, 2022. Main thematic links: education and capacity building for under privileged population primarily, circular economy, health, especially mental health .

The year of classes, which allowed me to choose a major stream, Human Resources Management, gave me a well-rounded preparation to tackle the final chapter of this academic program, the Master's Final Work (MFW). The first time I analysed MiM's brochure I saw the possibility of doing an internship in an NGO. I knew I wanted to have a professional experience to apply the knowledge I acquired for four years. I felt an experience in an NGO would prove even more valuable, and the impact of my work, for the lack of a better word, would be clear. I would help good causes. Meanwhile, I would gain a lot of know-how in an organization's different areas, be it operations, communication, or finance. This led me to seek organizations in the Portuguese social economy. I knew my skills would be better suited in an entrepreneurial setting, so I looked for impact enterprises. One organization popped up constantly, Casa do Impacto. A social impact hub, belonging to SCML's Department of Entrepreneurship and Social Economy (DEES), that promotes and helps solutions with social and environmental impact. By applying to do an internship at Casa do Impacto and DEES, I would be able to know the inner workings of the Portuguese social economy, through one of its most important players. I would get to know projects, entrepreneurs, and a whole set of important stakeholders in this new and disruptive environment. Casa do Impacto's work is centered around the SDGs. Program creation and startup selection place great importance in developing a diverse community, that seeks to include solutions for each of the 17 goals, but, ideally, several at a time. Casa do Impacto can be directly attributed with helping the development of SDG 8 (Decent Work and Economic Growth) and 9 (Industry, Innovation and Infrastructure), due to its ties with impact investment and project development, and with, more evidently, the fostering of sustainability driven innovation.

By the end of the internship, I would try to respond to the following questions: *What is the role of Casa do Impacto in the Portuguese social economy? Is it living to its full potential?* The tasks and programs I was involved with during the four months I was at Casa do Impacto allowed me to assess these two questions, as well as helping me comprehend the nuances of the Portuguese social economy and of an incubator, the challenges of being an entrepreneur in Portugal, creating and managing events, and dealing with high levels of bureaucracy.

In this internship report, the subsequent structure will be followed:

- Chapter 2 will analyze the concepts of social impact, innovation, entrepreneurship, and investment, and social impact assessment, through a brief literature review;
- Chapter 3 will offer an overview of the main characteristics of the Portuguese social economy, by reviewing the 2013 Framework Law, reports from INE about the subject (CSES and the Portuguese Social Economy Sector Survey) and presenting some of the most important institutions of the sector;
- Chapter 4 presents a short summary of the activities of SCML, DEES and Casa do Impacto, based on internal documents of the team, publications available in SCML and Casa do Impacto's website, and conversations with members of DEES;
- Chapter 5 will then describe the tasks I was responsible for, during my stint in Casa do Impacto and DEES (September 27th, 2021 - January 21st, 2022), including a brief assessment of the activities;
- In Chapter 6, the contribution of MiM's courses to the success of the internship will be established;
- Finally, in Chapter 7, I will answer the questions presented above, as well as critically analyse lessons learned during the internship.

CHAPTER 2 - A BRIEF REFLECTION ON SOCIAL IMPACT

Literature on the topic of social impact has only one consensual conclusion: the lack of agreement on the definition of social impact is obstructing its success. Clifford (2014) provides a four-element definition of social impact, using other author's insights:

- Social impact is the value created result of an individual's action (Emerson, Wachowicz, & Chun, 2000);
- That should ascertain the resulting value created upon stakeholders (Kolodisnky, Stewart, & Bullard, 2006);
- Which must consider positive and negative effects (Wainwright, 2002);
- And be compared to what the situation would have been, if the solution hadn't been implemented (Clark, Rosenzweig, Long, & Olsen, 2004).

Organizations such as Good Finance² and the Centre for Social Impact³ present their own definitions, as a result of their work on the field: "Social impact is the effect on people and communities that happens as a result of an action or inaction, an activity, project, program or policy" (Parrett), Good Finance, and "Social impact can be defined as the net effect of an activity on a community and the well-being of individuals and families" (Centre for Social Impact). In 1994, an interorganizational committee, presided by the U.S. Department of Commerce, considered social impact as the result of public and private actions on human populations that change the way groups "live, work, play, relate to one another, organize to meet their needs and generally cope as members of society" (Interorganizational Committee on Guidelines and Principles, 1994, p. 8), going one step further, adding that norm and value changing cultural impacts should be included as well, as they affect self-awareness and perception of value to society. Vanclay (2003, p. 8), in an effort to conceptualize social impact, suggested that it *occurs* when at least one of the following is changed: "people's way of life"; "their culture"; "their community"; "political systems"; "their environment"; "their health and wellbeing"; "their personal and property rights"; and "their fears and aspirations".

² Good Finance is a London-based project, created in 2016, that augments access to social investment information to charities and social enterprises. See <https://www.goodfinance.org.uk/>

³ Three universities, UNSW Sydney, Swinburne University of Technology and The University of Western Australia, collaborated to create the Centre for Social Impact, set in 2008, that aims to develop transformational research and education that enables others to achieve social impact. See <https://www.csi.edu.au/>.

2.1. *Social Innovation, Social Entrepreneurship, and Impact Investment*

The triad of terms that give title to this section see themselves featured alongside the word *social*. According to Barnett and Casper (2001), social environment relates to the proximate physical and cultural surroundings and social relationships affecting the inner and inter-actions of groups of people. The scale of such groups can differ, ranging from family units to entire regions. History and power relations play a big part. Social environments are constantly changing and adapting to internal and external forces. The two authors consider social environment as including:

“Built infrastructure; industrial and occupational structure; labor markets; social and economic processes; wealth; social, human, and health services; power relations; government; race relations; social inequality; cultural practices; the arts; religious institutions and practices; and beliefs about place and community”

In: Barnett & Casper (2001), p.465.

As one would assume, **Social Innovation**, **Social Entrepreneurship** and **Impact Investment** are no more than innovative, entrepreneurial, and investment efforts that have at their core the positive effects that these actions would bring to society. Impact solutions and solutions with impact are two different concepts. The first sees solutions having impact as their *raison d'être*, while solutions with impact relegate it to a secondary position, sometimes being seen as the side effect of operations, and not the main purpose. By comprehending the original definitions of each of these terms, we will understand the role the word social brings into the fold.

The work of Baregheh, Rowley and Sambrook (2009, p. 1334), compiling decades-worth of definitions of innovation, reached the following characterization: “Innovation is the multi-stage process whereby organizations transform ideas into new/improved products, service or processes, in order to advance, compete and differentiate themselves successfully in their marketplace.” These new solutions can be products and services clients were not offered before, or internal processes that increase the efficiency of operations within organizations (López & Martínez, 2018). The goal of innovation is to create and implement new ideas, while delivering value (Hubert, 2010), through solutions that move the business forward, helping it compete or differentiate from what the market has been offering.

Social innovation carries the characteristics seen for innovation, with additional importance given to meeting social goals and needs, normally associated to “organizations whose primary purposes are social” (Mulgan, Tucker, Ali, & Sanders, 2007, p. 8). Peyton Young (2011) summarizes it in the idea that social innovation is the introduction of a new solution that increases the welfare of those who subscribe to it, compared to the standard of living felt before. The major difference from traditional innovation and the social type is the contrasting end goals because business innovation is linked to profit maximization, despite outlier cases that can mix the two. Hubert (2010) prefers to see social innovation as new solutions that simultaneously tackle social needs and change the way social relationships and collaborations occur. Peyton Young (2011) considers that social innovation’s success depends on: 1) the network of stakeholders, with special importance when in small environments; 2) the real increase in welfare the solution brings compared to the *status quo*; 3) the “noise” (interest) gained by the solution in the best-case scenario. The scholar adds that clustering is a tool that helps a quick dissemination of social innovations.

Stevenson (1983, p. 3), a Harvard Business School (HBS) professor, defined entrepreneurship as “the pursuit of opportunity without regard to resources currently controlled”. This approach parallels the baseline created by Joseph Schumpeter. Through the eyes of Martin and Osberg (2007, p. 31), Schumpeter sees the entrepreneur as the necessary agent of chaos, the one that prevents the Economy becoming stale, the one that “drives economic progress”, by creative destruction. Entrepreneurs influence the Economy because they have the *burden* of fostering innovation and technological change. Peter Drucker judges entrepreneurs differently, preferring to consider them as people that seek and look for change, acting on it, and seeing it as an opportunity from which they can gain, instead of being the people that begin change itself.

Ashoka is the leading social entrepreneurship movement, which started in the 1980’s. William Drayton, founder of Ashoka⁴, said: “social entrepreneurs are the essential corrective force. They are system-changing entrepreneurs” (Ashoka); sentences that can be seen in Ashoka’s website. **Social entrepreneurship** wants to innovate and generate value through a positive impact on society. Martin and Osberg (2007) see both

⁴ Ashoka is a non-profit organization, created in 1980, that finds and empowers *changemakers*. It wants to transform everyone into able leaders, capable of making the world a better place.

entrepreneurs and social entrepreneurs as motivated by the opportunity to create, develop and realize their ideas and vision. Unlike the stereotype of the Silicon Valley entrepreneur, that seeks to further their innovation and capitalize on it, social entrepreneurs don't see profits and financial results as the end all be all of their business. Social impact takes that place (Dees G. , 2004) (El Ebrashi, 2013). Financial results are still crucial, because businesses need to stay afloat and be sustainable to prosper, but the priority is put on the welfare of the beneficiaries of the solution, not the shareholders or managers (Dees G. , 2004). When profits are available, they should be reinvested in the organization, to try and impact even more people. The necessity to have social organizations with sound financial results, meaning they are financially sustainable, has led to the expression “profit with purpose” (United Nations - Department of Economic and Social Affairs, 2020).

The OECD (2004), in their conference report about promoting entrepreneurship and innovative SMEs, dedicates a chapter to the role that financing has on fostering innovative SMEs. Risk takes center stage. High administrative costs and uncertainties regarding results that are to come make these organizations less attractive to financiers in the private sector. The report highlights expanding innovative SMEs in this struggle. Three reasons are put forth: 1) the volatility and uncertainty of projected results is too high and often skewed; 2) there is an information gap between entrepreneurs and investors, where entrepreneurs hold much more know-how regarding their operation, product, and market, especially in innovation environments; 3) difficult judgement and assessment of, often intangible, innovation, particularly in early-stage development. These challenges deter private investment, which lead to the development of publicly designed programs to finance SME-led innovative projects.

“The desire to do good while doing well” (Brest & Born, 2013, p. 22). This is the often-heard sentence when discussing **Impact Investment**. These are financial opportunities that can lead to measurable environmental or social benefits. Impact investing is the act of applying capital in businesses capable of generating social good, while, at least, breaking even for the investor (Kasturi Rangan, Appleby, & Moon, 2012). Other forms of financing, such as social grants, remove the idea of having financial returns entirely. Impact investors are usually called upon to help young and inexperienced companies, that fall under the SME banner, to prosper and develop a sustainable

operation, providing a lot of non-financial support as well. According to KPMG's guidebook to "Understanding impact investing" (2018), there is a high degree of flexibility in terms of the structure of deals, considering the risk and the potential return/impact of the solutions. One common type is "Payment by Results", which sets that the return to investors and payouts to organizations are dependent on the impact achieved.

2.2. Social Impact Assessment

Social Impact Assessment (SIA) is the evaluation of actions placed upon families and communities. For Vanclay (2003, p. 6), SIA is the process of "analysing, monitoring and managing the social consequences of development". These can be projects, programs, policies, and others. Applying a model of SIA is a way to provide structures that allow social economy entities to measure their activities, bringing with it the ability to evaluate, compare and perceive evolution. Having information and results that back the entrepreneur's narrative will increase the legitimacy of the endeavor, building trust levels between stakeholders, thus increasing the chances of gaining funding, for example (Wainwright, 2002).

Currently there is no definitive model for the assessment of social impact. The European Commission acknowledged this in their Social Economy Action Plan. In order to increase the effectiveness of communication of social economy actors, either to spread the word on the value their *impact* brings or to access impact-driven financing, the EU is setting measures in their action plan that will "support the development of social impact measurement and management" (European Commission, 2021, p. 6). This will materialize in: studies that look at existing practices in terms of SIA; training on SIA for social economy stakeholders; and the development of "simple standard methodologies" of SIA, set to be ready in 2023. An emphasis should be made on the word simple, because, as the European Commission points out, small and less experienced social economy enterprises often feel overwhelmed and *lost* when dealing with so many SIA models and tools. Models don't tend to consider the variability in terms sector and impact types, and in dimension and life cycle stage of the solutions and organizations.

The literature settles on the opinion that performance appraisal for the sector should be based on outputs and outcomes (Vanclay, 2003) (Clark, Rosenzweig, Long, & Olsen,

2004) (Cordery & Sinclair, 2013) (El Ebrashi, 2013) (United Nations - Department of Economic and Social Affairs, 2020). Outputs are the products, goods and services, resulting from the organization's operation, that can be measured. Outcomes are the changes to the *status quo*, the short and medium term effect of the outputs on the beneficiaries' lives, with impact being the long term changes (Clark, Rosenzweig, Long, & Olsen, 2004) (Cordery & Sinclair, 2013) (KPMG International, 2018). Clark et al. present an impact value chain (Figure 1), to illuminate on the different stages to reach impact, following the concepts of outputs and outcomes.

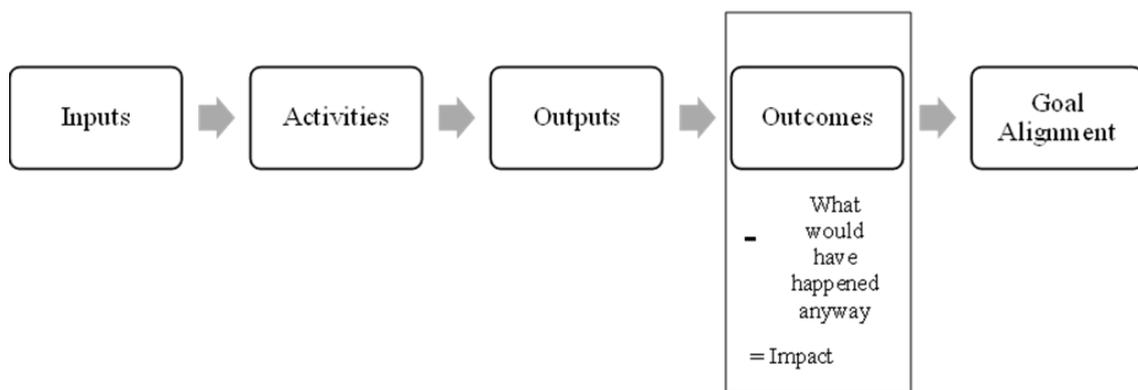


Figure 1 - Impact value chain

Source: Clark et al. (2004), p. 7.

CHAPTER 3 - SOCIAL ECONOMY IN PORTUGAL

In 2013, the “Social Economy Framework Law” (Lei n° 30/2013 de 8 de maio, 2013) was put into effect in Portugal. Following the tradition, social and cooperative sectors have in the Portuguese Economy, which is visible in the 1976 Constitution, this new law was meant to establish the fundamental definitions and incentives related to the sector. Article 4 enumerates the types of entities belonging to the social economy: cooperatives; mutualist associations; *misericórdias* and charities; foundations; private institutions of social solidarity (IPSS); associations with altruistic ends, in the cultural, recreational, sports and local development scope; entities that, under the Constitution, belong to the community and self-managed sub-sector of the cooperative and social sector; and other entities that respect the principles of social economy. The legislator does not include social enterprises, nor does it indicate any incentive for its creation, despite international organizations’, such as the OECD or the European Commission, efforts to do so (Nogueira, 2015), thus only including strictly non-profit organizations. This comes after initial versions containing such organizations, which were excluded from the final document. Nogueira (2015) argues that Portugal should follow other European countries’ initiatives and create a specific legal form for social enterprises, further emphasized by the European Commission (2019, p. 11), “indeed, the main obstacle for the further development of social enterprises in Portugal is the lack of debate, clarification and some sort of agreement about its meanings”.

INE alongside CASES⁵ prepare periodic overviews of the social economy in Portugal, through the Social Economy Satellite Account (CSES). Such studies and accompanying database are expected to be created, managed, and updated, under article 6 of the Framework Law. Three reports have been published, related to the years of 2010, 2013 and 2016. A new edition is set to be released in 2023, which will analyze the period marked by the Covid-19 pandemic. Table I provides a comparison of some indicators, seen in the three published reports. The sector is growing, more evidently in number of entities, despite fluctuation in number of employees. The social economy has a relevant

⁵ According to the Government’s website, CASES is a public interest cooperative, based in a partnership between the State and social economy organizations. CASES has the goal of strengthening the social economy, deepening the cooperation between the State and organizations of the sector, as well as promoting policy making related to volunteering (ePortugal.gov.pt).

place in the Portuguese economy, with over 6% of total work force and around 3% of gross value added. Of course, by definition, the value social economy entities create - social impact - can not only be seen by a financial/monetary prism. These entities depend almost exclusively on their employees to be successful, with around 90% of GVA being *transformed* into wages. However, despite this importance, social economy employees are, on average, receiving 14 pp below national levels.

Table I - Comparison between data from CSES for 2010, 2013 and 2016

	2010	2013	2016
<i>Social economy entities</i>	55,383	61,268	71,885
<i>GVA⁶_(Social Economy/ National Economy)</i>	2.8%	2.8%	3.0%
<i>Employees</i>	226,935	215,963	234,886
<i>Employees (Social Economy/ National Economy)</i>	5.5%	6.0%	6.1%
<i>Average compensation of Social Economy employees (Portuguese economy =100%)</i>	83.1%	86.4%	86.3%
<i>Compensation of employees/ GVA (Social Economy)</i>	92.8%	94.5%	89.7%
<i>Compensation of employees/ GVA (National Economy)</i>	57.3%	50.9%	50.5%

Source: Social Economy Satellite Account (INE, 2013; INE, 2016; INE, 2019)

CASES and INE's "Social Economy Sector Survey" (INE, 2020) provided information about the sector. This report focused on management practices and entity characterization, with 2018 being the year of reference. Some values that caught the eye are presented in Table II. The table demonstrates that social economy entities do not

⁶ "Gross value added (GVA) is defined as output (at basic prices) minus intermediate consumption (at purchaser prices); it is the balancing item of the national accounts' production account. GVA can be broken down by industry and institutional sector. The sum of GVA over all industries or sectors plus taxes on products minus subsidies on products gives gross domestic product" (Eurostat, 2019).

implement SIA practices, which does not surprise, since around half of the organizations do not use indicators to monitor nor evaluate performance. Such lack of professionalization affects the success of the sector. Another topic of concern is the reduced participation of women in leadership positions in the sector, particularly compared with the middle management positions.

TABLE II - INDICATORS FROM THE PORTUGUESE SOCIAL ECONOMY SECTOR SURVEY

	2018
<i>Social Economy entities without SIA practices</i>	92.7%
<i>Social Economy entities without indicators that monitor and evaluate performance</i>	46%
<i>Social Economy entities without document management systems</i>	80.5%
<i>Social Economy entities led by women</i>	21.9%
<i>Female Executive board members in the Social Economy</i>	29.6%
<i>Middle management positions held by women in the Social Economy</i>	62.4%

Source: Inquérito ao Setor da Economia Social - 2018 (INE, 2020)

The European Commission promotes a series of reports named “Social Enterprises and their ecosystems in Europe”, with country reports available for each member state. Portugal’s, released in 2019 (European Commission, 2019), provides a thorough examination of the country’s main players in the field of the social economy, of which the following are a sample:

- Governmental departments and institutions: Ministry of Solidarity, Employment and Social Security; Ministry of Economy; IAPMEI; IEFP.
- Partnership and social and civic dialogue bodies: CASES; CNES; Conselho Económico e Social.

- Organizations promoting, certifying and awarding labels, business prizes, social reporting systems: Prémio Cooperação e Solidariedade António Sérgio (by CASES); Prize Manuel António da Mota (Mota Engil); Prize INSEAD Empreendedorismo Social.
- Financial intermediaries for social enterprises and support infrastructures: EMPIS; Fundação Calouste Gulbenkian; Fundação EDP; Associação Mutualista Montepio.
- Incubators: Casa do Impacto (SCML); SEA–Agência de Empreendedores Sociais; Social Lab – Fundação EDP; Coopjovem (by CASES).

Portugal Inovação Social is a governmental initiative launched in 2017, promoted by EMPIS, funded by the European Social Fund, in a value of around €150 million, and is part of Portugal 2020 Partnership Agreement. In fact, Portugal was, until 2020, the only EU member state using EU funds to develop financial instruments to foster social innovation and impact investment. Solutions and projects that seek funding are incentivized to establish partnerships with *senior* organizations in the social economy, such as foundations, associations, or public authorities, sometimes being mandatory to apply for programs. This promotes the development of the ecosystem, giving both small projects and larger entities the opportunity to progress, and stimulate the growth of the sector.

CHAPTER 4 - THE CASE OF SCML, DEES AND CASA DO IMPACTO

Santa Casa da Misericórdia de Lisboa (SCML) is an institution founded in 1498, by Queen Leonor to respond to the challenges created by the Age of Discovery, when Lisbon became crowded with “beggars and foundlings”, “widows and orphans” (SCML). Currently, SCML’s mission continues to support the idea to “improve the well-being of the person as a whole, giving priority to the most unprotected” (SCML). The institution’s motto sums it efficiently: For good causes (“Por boas causas”). SCML plays a pivotal role in providing social care and health services in the Lisbon region. In the 2021 overall budget, SCML projected to spend an amount close to €290M (SCML, 2020). It also has an extensive patrimony and art collection, and, in Portugal, on an exclusive basis, SCML is responsible for operating social games – Jogos Santa Casa -, such as the lottery, Euromillions, or scratch cards (“raspadinha”), on behalf of the State. SCML is a legal person governed by private law and public administrative utility. Under current organizational structure⁷, SCML’s board is composed by the President (in Portuguese, “Provedor”) and four board members (“Administrador”), that share between themselves the supervision of SCML’s departments, units, cabinets, hospitals and schools. The President is appointed by joint order of the Prime Minister and the member of the Government who exercises oversight of SCML⁸. Board members, on proposal from the President, are appointed by the member of the Government with oversight over SCML.

The Department of Entrepreneurship and Social Economy (DEES) is a statutory department of SCML, with its own budget and accounting, which integrate SCML’s. The organization gives DEES the task of promoting, supporting, and publicizing the creation and development of initiatives that relate to social entrepreneurship and economy. The department is overseen by the board member responsible for the areas of Social Action and Health, at the time of writing, board member Sérgio Cintra, under the Presidency of Edmundo Martinho. The executive director (in Portuguese, “Diretor”) of the department is Inês Sequeira.

DEES is composed of three units (Figure 2):

⁷ Organizational structure last updated in December 2021.

⁸ In recent governments supervision was made via the Labor, Solidarity, and Social Security Ministry.

- Training and Incubation Unit (UCI), with five people. Tasked with developing activities, programs, events, conferences, and partnerships within DEES' scope. Administers spaces allocated for incubation, as well as DEES' online platforms and communication;
- Social Investment Unit (UIS), with three people. Responsible for developing and implementing financial mechanisms for social investment within DEES' scope and developing instruments for social impact assessment;
- Social Innovation and Knowledge Transfer Unit (UISTC), with five people. In charge of mapping, characterizing, and promoting good practices of social impact and innovation. It supports the implementation of pilot projects within SCML.

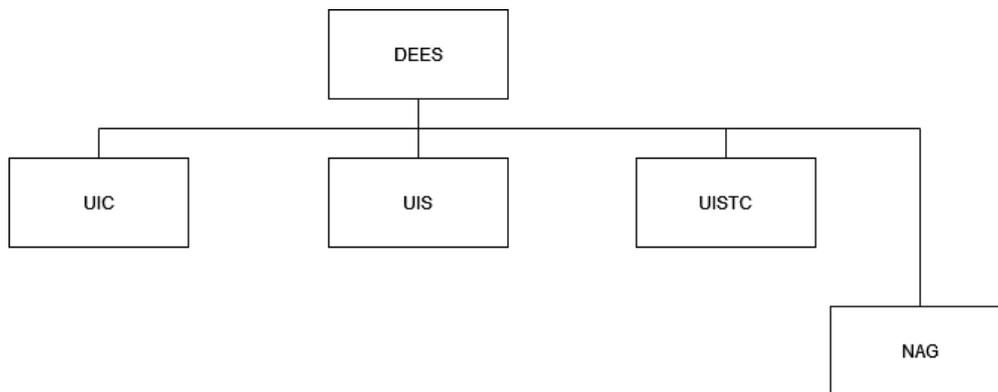


Figure 2 - Organizational chart of DEES

Source: SCML (2019), p. 8

The department has an administrative team (NAG – Núcleo de Apoio à Gestão), with three people, that help the day to day running of the department, while assuring process homogeneity and compliance with SCML rules. DEES has four more members, including the executive director, one advisor, one secretary and one administrative officer. Backgrounds are diverse, with people coming from, among others, the social care, law, communication, and management areas. The majority of personnel had experience in other SCML departments before coming to DEES. Within the department there is a prevalence of female employees, with 12, compared to 7 men. At the moment of writing, with the position of head of UISTC vacant, there is gender parity in the division of leadership positions with the executive director and NAG director being women, and UIC and UIC's led by men.

Casa do Impacto is a brand belonging to DEES, that serves as the commercial vehicle for DEES/SCML's social economy, innovation, entrepreneurship, investment, and capacity building endeavors. Members of UCI and UIS integrate Casa do Impacto's team, with assistance from personnel from UISTC. Casa do Impacto positions itself in the impact ecosystem as a social and environmental entrepreneurship and innovation hub, where startups, entrepreneurs, companies, institutions, and investors connect and develop projects with impact. Casa do Impacto began its operations in October 2018. In the three years since, Casa do Impacto had more than 200 resident entrepreneurs of over 50 incubated startups⁹. In its programs over 200 projects were supported. The organization established more than 30 national and international partnerships. Events played a big part: 100+ workshops and bootcamps; 9000+ attendees in Casa do Impacto events; participation in 200+ events and conferences. Following SCML's motto, Casa do Impacto wants to contribute to the creation of positive social impact, while showing the field can be profitable and scalable. The SDGs serve as the guiding star for Casa do Impacto's efforts, with the organization's comprehension of social and environmental impact being interlinked with them. Despite not having an official definition of impact, publicly available vision, mission, purpose, and sustainability statements set the values and the way operations are developed.

Casa do Impacto offers several programs:

- Acceleration: capacity building. Help develop new ideas and bring projects to market readiness. Through "Rise for Impact" and "Triggers", projects can expand and validate ideas, products, services, and business models. Mentoring, access to a network of partners, and, in some cases, financing, are provided;
- Incubation: Following the traditional views of startup incubation, Casa do Impacto offers a co-work office space that projects can share, while providing access to mentoring, periodic monitoring, events and the network of partners;
- Investment: Casa do Impacto's program +PLUS, with annual endowment of €500.000, allows entrepreneurs, startups, and social organizations to increase the impact of the innovative solutions they offer, by following a method of payment by results, based on outputs and outcomes;

⁹ To see a list of current projects associated with Casa do Impacto refer to Appendix 2. Information about main thematic links is also provided.

- Santa Casa Challenge: a competition that rewards innovative technological solutions resulting in devices, applications, digital content, web or communication services that advance edition specific themes, always related to the SDGs;
- Hackathon: promoted by DEES. An innovation marathon where individuals from SCML, social economy organizations and universities come together to create solutions for specific challenges.

DEES and Casa do Impacto operate with a philanthropic mindset. Financial and non-financial support provided does not result in future financial compensation for SCML. The only expected return is the positive gain from the solutions to its beneficiaries and the increase in awareness of the social economy, the solutions and programs bring. This came after analysis of the Portuguese social economy apparatus, during Casa do Impacto's inception, that lacked an organization that helped early-stage social and environmental solutions find their footing. Following the work done in the United Kingdom and other countries, where social grants are available for social enterprises, SCML, through Casa do Impacto, saw such strategy aligned with its values and financial possibilities. Although it is currently operating in such fashion, Casa do Impacto may evolve into other types of ventures, if the ecosystem matures, as partnerships are developed, and the pipeline of solutions progresses.

The team is run in a flexible and collaborative manner, with tasks being shared between personnel, attending to individual skills. However, it is possible to see people with different backgrounds, from management to social care, from within and outside SCML, accompanying the progress of programs and organizations. This generates a more heterogeneous team, which is indispensable for the highly disruptive and innovative startup environment. To foster internal innovation, Casa do Impacto gives tremendous importance to setting partnerships with specialized organizations, that will help shape certain aspects of its activity, such as strategy, communication, or program development.

DEES, Casa do Impacto, and the incubated projects are located at Convento de São Pedro de Alcântara, near SCML's headquarters.

CHAPTER 5 - TASKS PERFORMED DURING THE INTERNSHIP

The following sections will describe the main tasks I was involved in during my stint in Casa do Impacto, from late September 2021 to mid-January 2022.

5.1. Startup Scouting

The first task I was handed was to conduct a search of impact startups and projects that could be of interest to Casa do Impacto. This would allow me to have a better grasp of the impact ecosystem, while gathering valuable information for Casa do Impacto. I was able to determine my own criteria and scope. The direction given was to scout projects that would align themselves with at least one of the SDG's targets. As the objective was to construct a simple document, few categories were created: name of the solution; area of intervention; SDG tackled; current scale; potential scale; events, in which the project was present; website; email; cell phone number; leader of the project; and observations. Quantity and quality of information was dependent on projects' websites and social media, and media articles. If projects already belonged to an incubator, information presented in their website was considered relevant.

The ecosystem of social entrepreneurship in Portugal is still in a development stage. There are only some fully mature projects, and the development pipeline is a few years away from consolidation. Nonetheless, I was able to find projects in dozens of business incubators, such as Startup Braga, Universidade de Aveiro Incubator, IRIS and DNA Cascais. Innovation competitions, prizes and programs were also useful, with Mais Ajuda, SOL and the EIT being valuable. Many projects I deemed relevant already had previous ties with Casa do Impacto, either by participating in or applying to programs. This came to my attention when assessing available information about the project or by checking with colleagues.

5.2. Anniversary and Lisboa Social Mitra

Casa do Impacto celebrated its third anniversary in October 2021. The Covid-19 pandemic had prevented a lot of events from happening in the previous 18 months, including Casa do Impacto's. Nevertheless, as the country re-opened again after a full lockdown during the pandemic, the celebration went ahead. SCML used the opportunity

to present the project “Lisboa Social Mitra”. The €10M investment in the SCML Mitra complex in the Beato-Marvila region is set to create a nursery, an academy for the social economy, a community farm, a leisure garden for the surrounding community and the rehabilitation of a residential structure for the elderly. Casa do Impacto will be affected by the project, because it will move from its current headquarters to Mitra, scheduled to happen in 2023. The event occurred at Casa do Impacto’s next offices¹⁰, despite works being far from complete.

My involvement began five days before the event. I tracked enrollment for the event, through Casa do Impacto’s account on the online platform Eventbrite, while analyzing if people that received invitations collected their ticket. Meanwhile, a colleague and I prepared and organized materials to be taken to Mitra. Gift bags, flags, roll-up banners, tables, chairs, drinks, and others were included. In the hours leading to the arrival of guests, the entire team, including myself, rushed to arrange the venue, as the stage was being prepared for the online broadcast. During the event I belonged to the “welcoming committee”, alongside two colleagues. Guests were asked to check-in, using the opportunity to take one Casa do Impacto gift bag with them. I was able to greet and chat with people such as SCML board member Sérgio Cintra or singer-activist Dino D’Santiago, while meeting individuals from projects supported by Casa do Impacto, representatives from institutions, foundations, and companies interested in the social economy. Casa do Impacto’s anniversary allowed me to comprehend the logistics of planning an event, and how things can go down to the wire, with the hours before opening being very intense. By dealing with invitations, I got to know the relevant organizations and individuals in the realm of social impact and entrepreneurship. This was also one of the first occasions where I was the “face of an organization”, meaning I had to behave with the poise, confidence and knowledgeability associated with whom I was representing.

5.3. Web Summit

In the first month of my internship at Casa do Impacto, one event was always on the horizon: Web Summit. Web Summit is an annual technology conference, located in Lisbon since 2016, that gathers, for a few days, hundreds of startups, developers,

¹⁰ Photographs of the venue are provided in Appendix 3 and Appendix 4.

entrepreneurs, investors, and journalists. The event, in 2019, had 70,000 attendees, from 163 countries, with a total of 1200 speakers. 2021 marked the return to an on-sight edition, after 2020's online exclusive, due to the Covid-19 pandemic. However, the event happened with a reduced capacity and special sanitary cautions were taken. Web Summit's unique place in the world of innovation and startups makes it a crucial event for Casa do Impacto and DEES to participate in. Casa do Impacto's involvement in Web Summit serves to publicize programs and to meet new entrepreneurs, projects, investors, and potential partners. This happens while the organization emphasizes that entrepreneurship should be impact focused, thus providing a strong positioning for Casa do Impacto and its ecosystem. The occasion was used to launch new program Triggers¹¹, and to reveal the theme of Santa Casa Challenge's next edition. The investment program, +PLUS, which had an open call scheduled to close around one month after the event, saw Web Summit as a good platform to gain interest from projects and entrepreneurs. Being the main program for financial aid made +PLUS one of the main attractions at the Casa do Impacto stand.

In the week leading to Web Summit, I had to complete several tasks. Firstly, I prepared a guidebook with the schedule of talks and presentations, including, the names of participating startups and entrepreneurs, relevant for the team. The document had to be constantly updated, due to changes in the official schedule and line-up. The presence of SCML's President in one event was always taken into consideration, because no major activities would be happening at our stand and most of the team would be away, to attend Edmundo Martinho's conference. Secondly, I was responsible for helping participants from the entire SCML organization, if they had issues with authentication, downloading and logging-in in Web Summit's app. I was able to go to SCML's headquarters to meet and assist advisors ("assessores") to the President and personnel in the general secretariat. Thirdly, I had to do research, since I had designated time slots to be in the Casa do Impacto stand, where I needed to respond to questions about the organization and the programs, doubts that could come from any type of stakeholder.

In each of the three days of the event I had 3-hour time slots allocated to me, but the intense movement in the excellently placed stand called for a lengthier presence.

¹¹ Before Web Summit, promotional materials were prepared for the launch of Triggers, example of that is a video advert, in which I played a small role, with a frame seen in Appendix 8.

Nonetheless, I attended several debates and conversations, which I valued tremendously, because it was my first time there. In the stand I talked with dozens of entrepreneurs and investors, Portuguese and foreign. I witnessed presentations and masterclasses from Casa do Impacto resident startups, sessions about social economy and presentations made to high-ranking governmental figures such as the President of the Portuguese Republic, Marcelo Rebelo de Sousa, and the Minister of State for the Economy and the Digital Transition, Pedro Siza Vieira.

Web Summit's importance had been evident from the moment I joined. The investment of SCML in a central, considerably large, and colorful stand¹² had to grant results. "For good causes", that was the goal of Casa do Impacto being there, that materialized in introducing its work and its startups to bystanders and specialists in the area, while being exposed to new and innovative social impact ideas and projects. I witnessed the effort the team made to gain the interest of the people that passed by the stand, which, by the virtue of being on the venue's "main street", garnered a lot of curious looks. The feeling however was that sometimes people approached the stand either to only take the gift bag being offered or to do a 1-minute pitch of their project, even if it had nothing to do with social impact, because they saw the writings on the walls of the stand saying "investment", "startups" or "innovation hub".

5.4. Howz

After conversations with colleagues who worked in distinct departments of SCML, that introduced me to the essential work of the organization in providing social care in Lisbon, I was invited to help them in one of DEES' pilot projects – Howz. SOL – Smart Open Lisboa - is a startup program, validating and integrating innovative solutions that improve the lives of Lisbon citizens, with its first edition in 2016. SOL connects projects and startups to corporate and institutional partners, SCML being one of them. In 2019, under the theme "housing", SCML was an associated partner of SOL. Of participating

¹² Appendix 5 and Appendix 7 show the Casa do Impacto stand at Casa do Impacto, located in the main street of one of the pavilions. Appendix 6 shows the "family portrait" of the Casa do Impacto team present at Web Summit.

startups, SCML, alongside Axians, decided to fund a pilot project by British startup Howz.

Howz is a digital telecare company, providing home sensor technology to be used by health and care providers, families, and friends of people whose autonomy begins to dwindle. The bundle offered by Howz consists of a door lock sensor, a movement sensor to be placed in a corridor, for example, and a power plug sensor to detect use of certain home appliances. These are all real time accessible by the Howz app, seen in Appendix 9, that allows users, normally family members, or social workers, to check activity in the house of the patient and set alarms, if an out of the ordinary action occurs. SCML funded Howz's pilot project, which would be implemented through ten SCML social care patients. DEES coordinated this pilot project, by defining rules (e.g., app to be translated to Portuguese from the original English), communicating with SCML's social care teams to gain participants, installing devices in the homes of participants, and locally monitor tests, since the entire Howz team would remain in the United Kingdom. Such operation is usual since DEES is the department responsible for introducing and managing pilot projects of external organizations in SCML.

The process was far from smooth. Despite not contemplating a hefty investment from SCML's part, the process required substantial paperwork from several departments within SCML, from partner Axians and from Howz itself. Procedures gained an extra difficulty when matters concerning Brexit entered the fold. Since Howz is based in the UK, Brexit had legal ramifications in how contracts and flow of funds and devices occurred. Adjustments from Howz to the Portuguese market explain in great part this time gap. Despite SCML having access to a high number of potential participants, enrolment was not easy. Many teams in the social care department feel overwhelmed with existing work, and the introduction of a new "task" – dealing with Howz -, was only seen as such, and not an improvement. The Covid-19 pandemic had a major role, as both personnel and patients were less willing to "open their doors" to a new and unproven solution.

A partnership established in 2019 saw the installation of the first device in November 2021. I aided in the installation of devices in 4 homes in Lisbon, amidst the Covid-19 pandemic, that called for extra precautions, as it can be seen in Appendix 10. Patients were mostly elderly, with reduced mobility, and a few with mental illness or disease. The

process of installation also required explanation of the devices to the families, with an emphasis put on the inexistence of recording systems, filling of paperwork and clarification on scheduling of the test, feedback timelines and downloading of the Howz app. The installation of the devices and the Howz app in the family member's phone required simultaneous communication with Howz's offices in the UK, to guarantee the system was "up and running".

During the initiative I witnessed the challenges of establishing and implementing pilot projects, besides partnering with foreign companies. Allowing me to meet the people SCML helps daily, gave me a tremendous sense of purpose and appreciation for the role social workers have in society. Joining this project allowed me to recognize that one must create several voices depending on the person listening. A social worker, a family member, a patient, an administrative person in SCML, or a Howz project manager in the UK see the same service in separate fashions, each one with its preoccupations and priorities, and the role of DEES is to maneuver this myriad of people, while assuring the program is successful.

5.5. *+PLUS*

Casa do Impacto's impact investment program, *+PLUS*, run by UIS, with an annual endowment of €500.000 from SCML, supports solutions in two distinct stages: (1) Testing, for projects in an initial implementation phase, but already tested and validated - can apply to a maximum of €50.000; and (2) Scaling, projects already implemented and capable of providing impact results, that desire to increase the scope of their operation - can apply to a maximum of €100.000. Like other programs, *+PLUS* targets innovative solutions with impact. Social and environmental impact are both considered. Projects need to align themselves with the SDGs, by tackling at least one of the seventeen goals. *+PLUS*' first edition was ongoing when I joined, with Testing solutions reaching the final stage of their one-year membership with the fund. Scaling was different, as solutions were able to be associated with the fund for three years. While my involvement with first edition projects was reduced, the same cannot be said about the second. I joined the program in early November and left when my internship ended. Applications were being

accepted for 2 months, when I became a member of the team, although turnout was small. The deadline was set for November 30th.

The team composed of three other DEES employees and one member of partner organization, Sair da Casca, was, at this stage, responsible for reviewing incoming applications, while comparing standards of evaluation, through a calibration process. The objective was to have a consistent grading system. This was relevant because each member would not evaluate every project. The team was divided in two pairs, while I helped both. The program's rulebook presents the 6 categories, under which applicants¹³ are evaluated in the pre-selection stage, they are: qualifications and experience of the applicant; innovation level; business sustainability; quality of evidence provided (feasibility for Testing; efficiency for Scaling); impact potential (generation for Testing; increment for Scaling); and contribution to the SDGs (planned for Testing; already obtained for Scaling). Nonetheless, the team could set the numerical classification system and the weight given to each category, since it is not presented in the rule book. With the goal of creating consistency in evaluation and easy to follow guidelines, a 3-tier system was implemented (0; 5; and 10 points), with accompanying standards, to which classification should comply. In the weight of each category, an inferior emphasis was put on impact potential and contribution to the SDGs, due to the difficulty level associated to assessing them through the application. Other categories can be proven through evidence, or can be more thoroughly justified, unlike these two, during this phase. For the second edition of +PLUS, 227 applications were received, 146 for Testing and 81 for Scaling.

In accordance with the rule book, at this stage, 18 ineligible applications were identified, 12 for Testing, 6 for Scaling. Exclusion would happen because: implementation in Portugal was not expected; maximum amount for the specific type of support was exceeded (Testing and Scaling have different ceilings); maximum time for support was ignored (this edition changed from the previous one, equaling a maximum of 2 years for either type). The evaluation process was a first step to create the shortlist of successful applications. The team was preparing a small description for each project,

¹³ The application questionnaire had around 40 questions, including contact information and legal information about the solution. For assessment, 12 questions contained the information needed to directly evaluate the 6 categories, however, other entries were considered when relevant.

with remarks and explanations for some of the classifications, and organizing solutions by their overall score. For the shortlisting step, three other members of DEES joined the team, including the executive director. Of the entire set of 203 eligible solutions, only 35 would be shortlisted (25 for Testing; 10 for Scaling). Everyone gave their classifications and shortlist separately, but the final list was decided as a group. Aspects such as uniqueness of targeted social/environmental issue, distinctiveness within Casa do Impacto's community, maturity of the organization, and the role the program would play were considered when choosing projects.

Shortlisted projects integrate the program's bootcamp, a series of sessions that allows solutions to strengthen their business proposition and prepare a collection of resources to be presented to and evaluated by the final selection jury. These resources comply with templates created by +PLUS' team. Debates and changes were being made to the templates since December, anticipating its use in late January. Second edition's templates stemmed from the work done for the first, with the team, including myself, working to streamline and simplify. Templates are divided into four areas. The first asks for information about team members, and an "aim" section, that wants to know the goal of the solution and the importance of +PLUS' support. Secondly, a value proposition¹⁴ and business model¹⁵ sections. Thirdly, a segment allocated to the theory of change, where Clark et al.'s (2004) impact value chain model (Figure 1) can be seen, though it is slightly adapted: definition of resources, activities (already seen for the business model), results and changes (seen through outputs and outcomes) - answering the question, "what do we predict will happen?". This section also evaluates the contribution to the SDGs. The fourth and last portion of the templates requires projects to determine a results proposition and a payment by results structure. The templates will be essential to, in the future, conduct the process of SIA. The team prepared a series of guidelines for each entry, with auxiliary questions and characteristics.

The original application deadline of November 30th was postponed to December 20th, to garner more bids. Although the management team knew the days before a deadline

¹⁴ Value proposition required the definition of problem, solution, product, geographic region, innovation, and beneficiaries.

¹⁵ Typical business model canvas (with some entries removed, for lack of significance, or Value Proposition seen separately) composed by: resources, partners, activities, clients, revenue streams, budget.

coincide with an *exponential* increase in applications, the decision was made and announced a few days before the initial date. This allowed a communication push during those weeks, which had great results. When applications closed, well over 200 projects had applied, which massively superseded the number seen in late November or for previous year's edition. While the evaluation process was ongoing, with applications pouring in, I was asked to prepare and manage a contact list with information about each applicant. Future emails or phone calls would depend on this list. This list was first called into action when ineligible projects were contacted. A few weeks after, the same would happen for non-shortlisted and shortlisted projects. By the time I left Casa do Impacto, shortlisted solutions had been announced, templates finalized and the bootcamp was a few days away. Applications selected by the final jury for financial support from +PLUS were to be announced on February 28th.

5.6. Other tasks

My internship at DEES, alongside the tasks seen previously, was comprised of smaller assignments and activities. The following consist of only a sample.

DEES had been working to define its “Innovation and Social Impact Strategy”, with a working document in a well-developed stage. Due to my outsider's perspective, result of only being in the team for a week, I was assigned to review and suggest social impact, innovation, and entrepreneurship workshop activities the department could create and promote to the SCML community, partners, and potential clients. Main issues at hand were standardization of the workshop, freemium models, design thinking and connection to the yet to be created “Toolkit for the qualification for social innovation”, by DEES.

Casa do Impacto promotes activities within its community. One of them is “the Founder's Breakfast”. Project leaders are invited to gather and welcome a guest, normally someone relevant for the impact/entrepreneurship world, to discuss matters important to them, present their project and debate how the organizations can mutually benefit one another. I participated in two of these events: in the first, the then President of the Agency for Development and Cohesion, Nuno Santos; and, in the second, the Secretary of State for the Digital Transition, André de Aragão Azevedo, seen in Appendix 11. These events gave me tremendous insight into the challenges projects face and what is being done to overcome them, but mainly what is lacking. Themes such as extreme bureaucracy,

difficult and long procedures to access funding, lack of distinct legal framework for social enterprises, reduced common knowledge about social economy, digitalization, and many more were debated.

Despite not being integrated in the acceleration programs of Casa do Impacto, I was present in the “Rise for Impact Demoday”¹⁶, occasion when the 10 participants of that acceleration program had to do a 5-minute business pitch to a jury, composed of members of Casa do Impacto and partners. Three were selected to be incubated in Casa do Impacto. Although I helped with some logistical aspects for the event, the experience provided, mainly, an opportunity to hear and evaluate business presentations, from projects belonging to a wide range of sectors, from arts and crafts to health.

¹⁶ A photograph of the venue is provided in Appendix 12.

CHAPTER 6 - CONNECTING THE MIM WITH THE INTERNSHIP

My ambition of knowing Casa do Impacto through and through required the application of knowledge and tools I got during MiM's courses. The path I took in my major stream, Human Resources Management, ended having a clear contribution to my work in Casa do Impacto. Of the 17 courses and other activities the master program provided me, the following had the biggest influence during the internship:

- Business Strategy and Performance. For the evaluation process seen in 5.1. Startup Scouting and 5.5. +PLUS, I analyzed the strategy of solutions, internal resources, their market, differentiation strategy and many more. Tools such as Porter's 5 forces, even if not used directly, were intrinsically part of my judgement. Simultaneously, when developing Casa do Impacto's workshop strategy, I had the course's teachings in mind.
- Marketing Management. I perceived the quality of applications on their description of the market, segmentation, targeting, and positioning. The best were the ones that clearly explained product strategy, referring to pricing and the relationship between clients and beneficiaries. The marketing course revolved around these same topics. In occasions such as the anniversary or Web Summit I had to promote and communicate Casa do Impacto's work. My capacity to adapt to whomever was listening called for an instantaneous awareness of the person I was talking to, in terms of target audience and potential program preference.
- Excel & Python Analysis. Microsoft Excel was used to organize information for the startup scouting document or the contact sheet I created for +PLUS. The knowledge I gained in the class allowed me to introduce functions (mathematical, text, location, ordering, etc) and pivot tables, seamlessly. +PLUS depends a lot on Excel, hence I was available to help, whenever a colleague was in need.
- Team Management (Gestão de Equipas). The course introduced me to Design Thinking, that despite being intuitive, is different from the traditional *modus operandi*. It was a pleasant surprise when I understood this was the way Casa do Impacto worked. This is used to develop the team and organization's strategy and operations. Solutions that participate in Casa do Impacto

programs are also taught the method. Other out of the box tools presented in this class gave me flexibility to approach problem solving and team relationships, which are crucial to work in a disruptive setting.

- Change Management (Gestão da Mudança). Working in a disruptive setting calls for an aptitude to manage the hard process of introducing change to a collective. Knowing concepts such as the change S-curve, nudging, persuasion, and several change management models, made me more adept to deal with the stakeholders of an innovation hub, where change is the name of the game.
- Global Goals Awareness and Action Weeks. These two special weeklong events deepened my knowledge and appreciation for the SDGs. And, as proposed in the Action week, I acted on it by joining an organization whose entire goal is to make the SDGs prosper. Because of these initiatives, I was comfortable assessing applications, based on the values of the SDGs, or introducing the SDGs to visitors of Casa do Impacto's stand in Web Summit.

CHAPTER 7 - CONCLUSION

The rationale behind taking an internship route for my Master's Final Work was to apply the knowledge and skills I gained in a practical setting. I perceived joining DEES and Casa do Impacto as a perfect opportunity from the get-go. The "Internship Plan" I agreed to would allow me to accompany several aspects of the organization, its different programs and events. After 79 days and 550 hours of work, I can say it was all confirmed. The previous chapters gave a good glimpse into the activities I was involved in, with many more missing out only by a lack of space.

Concerning the questions laid out on the Introduction, the following paragraphs present the main conclusions.

What is the role of Casa do Impacto in the Portuguese social economy? Is it living to its full potential?

Casa do Impacto's three years are a success story, the numbers speak for themselves. International recognition such as, recently, becoming one of five Portuguese nominators for the Earthshot Prize, or establishing a partnership with the London School of Economics cement the role of the organization in the Portuguese impact ecosystem. An ecosystem that continues to ignore, legally speaking, the existence of social enterprises, despite Casa do Impacto and its community showing the concept is alive and well in Portugal. Participation in events such as Web Summit that promotes innovation and entrepreneurship demonstrates that stakeholders validate the values, structures and business models of solutions and projects such as the ones associated with Casa do Impacto.

SCML, through DEES, created Casa do Impacto to serve as a hub for all stakeholders in the social economy. It suits SCML's values. It is all about good causes. However, by virtue of belonging to SCML, DEES and Casa do Impacto suffer with some of the organization's issues. A highly bureaucratic environment, with a politicized hierarchization, that looks over an immense number of units and workers, results in Casa do Impacto and DEES being seen as an oasis. It works at a different rhythm than other departments, with power being shared and disruption being welcomed and incentivized. But the dynamism Casa do Impacto has is hindered when faced with the necessities put on them by SCML, which are understandable for an organization with thousands of

employees, that must deal with matters such as public procurement. Pilot projects like Howz, despite their merits and benefits, are introduced in units overwhelmed with current tasks. An evident lack of time from social workers and employees from other departments affects the capacity to introduce change processes to SCML, with a good example being pilot projects, that come and go, with few being truly successful and implemented permanently.

As it could be seen in chapter Chapter 3 - Social Economy in Portugal, a lot must be done in the Portuguese social economy. Few are the organizations that measure impact, which is not surprising when considering the lack of *professionalization* of a sector that employs 6% of working population. Casa do Impacto could be one of the main propellers of change. The central position of the organization and the backing by SCML should be enough to allow the creation of standards, methodology and common language and criteria for the Portuguese market. Such definitions are lacking, even at a European level. The vast array of partners Casa do Impacto has could play a big part in achieving an overwhelming consensus. Casa do Impacto and other main players in the Social Economy, especially the ones concerned with the success of social enterprises, should also push for greater acknowledgement of the subsector. Changes to the law, incentives for social enterprises, more governmental programs, such as Portugal Inovação Social, would be a good start.

If the SDGs are here to stay and serve as the orientating objectives for our future, then more sustainable ideas, that focus on the well-being of people, must be supported and recognized. Social economy entities' role cannot be underestimated. These organizations were living by the values of the SDGs, long before their launch in 2015. SCML, DEES and Casa do Impacto are perfect examples of the value SDG focused organizations bring to society. This internship allowed me to understand the dynamics and challenges of the social economy. I was able to develop the knowledge I acquired in university and use it in an entrepreneurial setting, that deals with innovative ideas that help people live a better life.

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APPENDICES

Appendix 1 – The 17 SDGs, source: “The 17 Goals” (United Nations)

1 No Poverty	2 Zero Hunger	3 Good Health and Well-Being
4 Quality Education	5 Gender Equality	6 Clean Water and Sanitation
7 Affordable and Clean Energy	8 Decent Work and Economic Growth	9 Industry, Innovation and Infrastructure
10 Reduced Inequalities	11 Sustainable Cities and Communities	12 Responsible Consumption and Production
13 Climate Action	14 Life below water	15 Life on land
16 Peace, Justice and strong institutions	17 Partnerships for the Goals	

Appendix 2 - List of start-ups, projects and solutions associated to Casa do Impacto, updated as of February 14th, 2022. Main thematic links: education and capacity building for under privileged population primarily, circular economy, health, especially mental health

55+	Academia de Código	Actif	Africa Educational Trust
Ambigular	Ashoka Portugal	Associação DNovo	BlaBlaBlue
Chatterbox	Circular Economy Portugal	Clynx	Colombina Clandestina
Conexion 2030	Cosmos Pics	Doctor Spin	Dreamwaves
Empow’her	Estúdio Manifesto	Forest Impact	Future Films
Glooma	GoParity	IES-Social Business School	Impulso
It’s About Impact	Manicómio	Matter	Maze
MyPolis	Neki	Nevaro	NoCode Institute
NoHarm.ai	Reshape	Sea Shepherd x The Ghost Network	Shifter
Skizo	Speak	Spot Games	SurgeonMate
The Equal Food Co.	The Minimal Magazine	Ubbu	Value Flow
Vencer Autismo	Well-Being Project	Youth Climate Leaders	

Appendix 3 - Casa do Impacto's 3rd Anniversary.

Source: Casa do Impacto's Facebook page



Appendix 4 - Presentation of Lisboa Social Mitra at Casa do Impacto's 3rd Anniversary. Source: Casa do Impacto's Facebook page

Impacto's Facebook page



Appendix 5 - Casa do Impacto's Web Summit stand



Appendix 7 - Casa do Impacto's Web Summit stand



Appendix 6 - Casa do Impacto's Web Summit team. Source: Casa do Impacto's Facebook page



Appendix 8 - Participation in Triggers' advert, launched at Web Summit.

Source: Casa do Impacto's Facebook page

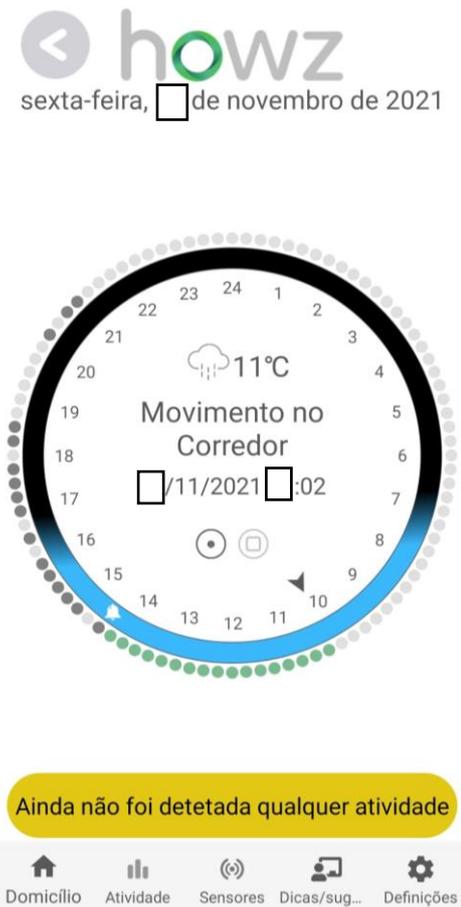


Appendix 10 - Installation of Howz's devices



Manuel Gonalo da Costa Gaspar

Appendix 9 - Example of Howz's mobile app interface



Masters in Management (MIM)

Appendix 11 - Founder's breakfast with the Secretary of State for the Digital Transition. Source: Casa do Impacto's Facebook page



Appendix 12 - Rise for Impact Demoday

