

A Work Project, presented as part of the requirements for the Award of a Master's degree in
Management from the Nova School of Business and Economics.

Marketing for Impact Field Lab

Centro de Educação para o Cidadão com Deficiência: Analyzing and Strengthening Partner
Engagement

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Abstract

This Master thesis consisted of analyzing CECD (Centro de Educação para o Cidadão com Deficiência), a Portuguese non-profit organization focused on supporting individuals with intellectual and developmental disabilities, and its current situations and organizational challenges within the social economy context. The purpose of the study is to recommend actionable strategies that will foster stakeholder relationship through strategic communication initiatives focused on partner engagement. In order to answer the overall project's problem, insights were obtained through semi-structured interviews with employees, partners, and a marketing specialist, complemented with secondary data collection.

Keywords: Non-profit organizations, CECD, partner engagement, partnership strategy, direct contact.

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1. Overall Organizational Challenge and Work Project's Objectives (Group Part)

The Centro de Educação para o Cidadão com Deficiência (CECD) a Portuguese non-profit organization that first opened their doors in 1976 with the mission of providing high-quality support to individuals with Intellectual and Development Disabilities (IDD), multiple disabilities and other vulnerable populations, CECD's core beneficiaries. Additionally, the organization champions IDD individuals' full inclusion in society and the protection of their rights. According to the 2021 Census, 10,9% of the Portuguese population are living with some type of disability, (Strategy and Planning Department, 2023, p. 1) meaning that organization like CECD, who work towards an inclusive society, are extremely important. Despite its great efforts CECD faces significant organizational challenges.

After a meeting held on September 25, 2024, with two employees of CECD, the participants of this study, who all are masters students at NOVA School of Business and Economics, identified a major challenge that relates to a strategic deficit in communicating its value proposition to internal and external stakeholders, which has affected the performance of various areas of the organization, such as; branding efforts, stakeholder relations, marketing efforts and business portfolio. Thus, the overall statement of this project is: **Investigating actionable approaches for CECD to strengthen its stakeholder relationships through strategic communication efforts, while optimizing the portfolio of its Protected Employment Center to improve financial sustainability.**

Based on these insights, marketing presents itself as an essential tool for identifying and tackling strategic deficits in CECD's internal and external communication while considering the diverse needs of the different areas of study, acting as a bridge between the organizational challenges and possible actionable strategies. By analyzing CECD's current brand identity and understanding stakeholders' perceptions, marketing will provide actionable approaches that will strengthen the organization's image and connection with the community while helping create

more meaningful collaborations and assessing the Protected Employment Center’s Plant Nursery and Laundry potential, may help uncover opportunities to further develop the service portfolio. Through cost-effective communication initiatives and strategic planning, marketing will ensure the effective communication of its value proposition, with a seamless connection with on-person events such as the 50 Years Anniversary Gala, which will serve as a booster to these efforts and help support the organization's financial sustainability.

The study intendeds to focus our efforts on the identification of difficulties and explore strategic and tactical solutions to effectively convey CECD’s service portfolio and social mission. Ultimately, to provide CECD recommendations on how to promote a positive relationship with stakeholders and achieve long-term financial sustainability.

Five areas of improvement have been identified, for which, five project objectives have been formulated (*please see Table 1: Project’s Objectives*)

Table 1: Project's Objectives

Objective #1	Assess the performance potential of the Protected Employment Center’s Plant Nursery and Laundry within CECD’s service portfolio
Objective #2	Analyze CECD current brand identity and internal and external stakeholder’s brand perceptions.
Objective #3	Assess CECD’s current partner engagement practices.
Objective #4	Investigate cost-effective communication strategies to better communicate its value proposition and integrate it with the on-person events.
Objective #5	To investigate how the upcoming 50 Years Anniversary Gala can serve as a strategic opportunity for CECD to integrate potential solutions, including enhancing brand visibility,

	<p>maximizing stakeholder engagement, and establishing itself as a fundraising platform to support the organization’s financial sustainability.</p>
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Source: own elaboration

Additionally, this project will incorporate both primary and secondary data. Regarding the primary data, eight semi-structured interviews were developed to ten key stakeholders who were divided in three main groups: internal stakeholders (employees), external stakeholder (partners), and an NGO Marketing Specialist. It was also ensured that participant was carefully selected, so they were knowledgeable respondents who could provide in-depth insights. For secondary data, information about the company was gathered from publicly available internal documents, such as financial, activities and budgeting reports. Given the scarcity of available data, an exploratory data analysis was applied, which is expected to yield theories and insights regarding CECD communication and financial challenges. Publicly available internal documents, such as financial, activities and budgeting reports were also used in this analysis.

This project is divided in six main sections. Section two will provide information regarding CECD, its core values, business portfolio, marketing assessment and more. Followed by Section 3: study’s methodology, that will explain the approach used to conduct this project. Section four will be dedicated to answering to the objective related to Partners Strategy. Moreover, section five will disclose the proposed final recommendation followed up by conclusions and limitations in section six.

2. Background to the Study (Group Part)

2.1.Context of Study: Private Institutions of Social Solidarity

Beneath the broad umbrella of Cooperatives, Mutual Association and NGO, there exist a specific type of entity known as Private Institutions of Social Solidarity (PISS) which

particularly deserves closer attention. This specific category, PISS, was instituted in Portugal under the framework of social solidarity policies since 1982, with their foundation solidified by key legislations such as Decree-Law No. 119/83 and Decree-Law No. 200782 (Dieguez & Conceição, 2017, p. 15). The rights and duties of Private Institutions of Social Solidarity thanks to laws as this two were established, and a legal framework and a solid groundwork have defined the role of PISS in the broader social welfare network.

PISSs play a critical role in complementing the public social welfare system, particularly in areas like health, education, elderly care and services for people with Intellectual and Development Disabilities (IDD). Working often in an environment where public services are limited, making them essential in aiming underserved communities which are seeking for help (Bauer & Dorn, 2017, p. 5).

In this overall situation entities such as CECD - which is a non-profit social solidarity cooperative, recognized as a Public Utility Institution and internationally certified by EQUASS Assurance - along with many other social enterprises in Portugal are trying to make the difference by addressing the specific needs of the many communities that still present gaps and necessity to be fulfilled (Pereira, Rodrigues, & Veiga, 2024, p. 12).

Despite the many difficulties that a country can have, it appears that the third sector in Portugal demonstrated a dynamic environment able to adapt to the fluctuation of a country that is more innovative than ever (Ferreira, 2015, p. 28). Data made by the Social Economy Satellite Account (SESA) - which is a comprehensive statistical framework designed to measure and analyze the economic impact of the social economy sector in Portugal. Developed by a collaboration between António Sérgio Cooperative for the Social Economy (CASES) and Statistics Portugal (INE) - confirm what has just been said illustrating how the third sector still experiences consistent growth over decades of history. In which year after year the progress made by entities such as PISS helped the life of many people with IDD.

In 2020, it has been proven that most of those entities, around 55,3% of them, were between 10 and 49 years of experience, reflecting the maturity and tenacity of the sector in Portugal. This is further stressed by the remarkable growth from 55,383 in 2010 (when the longevity of the sector started) to 73,851 in 2020 - a 33% improvement (SESA Report, 2020, p.13). However, is important to specify that this large number doesn't not relate just to PISS but it compounds many other types of reality such as charities and community groups, social enterprises, cooperatives-mutual associations and Non-Governmental Organization.

More precisely, the constant growth of the social services sector is further evidenced by recent studies conducted by Eurostat (Eurostat, 2023, p. 18). According to the results of the European Health Interview Survey (Eurostat, 2024a, p. 12; Eurostat, 2024b, p. 27), roughly 16% of Portugal's population, or 1.6 million people, report having a disability or activity limitation that limits their ability to participate in social and personal activities. According to earlier forecasts from previous years, this number is in line (Instituto Nacional de Estatística, 2024, p. 45). Nearly 19% of EU citizens have functional restrictions, according to the 2024 status report on the European Union's implementation of the Strategy for the Rights of Persons with Disabilities 2021–2030 (European Commission, 2024, p. 9). About 11% of people with moderate difficulty and 8% of people with severe limits in their everyday activities are included in this number. This frequency is much higher among older populations and those from weaker socioeconomic backgrounds, highlighting the continued need for properly targeted policy initiatives.

Among those problematic, the issue of greater economic instability among individuals with motor and intellectual disabilities in Portugal, as previously discussed, is one of the factors that motivates organizations like PISS to improve the independence of these individuals. It sufficient to consider that in the year 2022/2023, 30.5% of households with a member with a disability in Portugal were at risk of poverty and social exclusion (Equal Times, 2023). This

means that these households had a significantly higher possibility of facing financial difficulties and social isolation compared to the general population. The situation is worsening when analyzing social isolation. Approximately 40% of individuals with personal problems report feeling socially isolated, which affects their mental health and overall well-being (CLSBE,2023). On the other hand, in terms of employment, the participation of people with personal limitations remains low, only 0.5% works for the private sector while just 2.4% of the public sector workforce is composed of people with disabilities (ESN 2023).

For those expressed reasons, now more than ever, the future of social entities is a pivotal point. The forthcoming chapters and their corresponding research objectives aim to investigate why a clear understanding of the organization's mission, and the subsequent demonstration of impact is what drives more than 50% of contributors to give grants (Nonprofit Communications Report,2023, p.14). And why, bridging mission clarity to visibility efforts is one of the most successful ways to engage with the audience and gain forecasted future goals.

As the European Social Enterprise Monitor demonstrates, PISS with active marketing campaigns experienced a 35% higher community engagement rate compared to those without such efforts (European Social Enterprise Monitor, 2023, p. 14). Meanwhile, additional studies made by areas as philanthropy, found that robust communication strategies can increase donor retention by 50%, largely through impactful updates and transparent storytelling (Mishra, Boynton, and Mishra 2017, p. 5; Philanthropy Trends Report, p. 22, 2023). Finally, a report made in 2023 concerning digital engagement, displayed that social media and newsletters initiatives boost stakeholder interaction by 40%, and video content is even more effective, achieving a 66% higher engagement rate than text-based content (Video Marketing Insight, 2023).

Over the necessity of a clear communication and marketing strategy, the latest trend in Portugal draws attention to another core point: financial sustainability.

Social companies in Portugal encounter considerable financial difficulties, with more than 70% dependent on government funding and contributions, rendering them susceptible to fluctuations in public spending priorities and donor support (OECD, 2020). Merely 30% of Portuguese social companies indicate the presence of multiple revenue streams, far lower than the European average of 45%, (European Social Enterprise Monitor, 2023). Furthermore, 65% of PISS encounter yearly financing deficits, constraining their capacity to broaden programs and invest in essential infrastructure (European Social Economy Monitor, 2023).

Looking ahead, social enterprises in Portugal confront a progressively intricate landscape shaped by competition for donor support due to the convergence of SE entities in the Metropolitan area such as Lisbon and Porto (NUT III) which together account for the 35% of the total number of PISS (Statistics Portugal 2021; Social Economy Satellite Account, 2020), the financial vulnerabilities and growing expectations for measurable social impact.

To illustrate how an organization can navigate and tackle all these hurdles, this thesis will focus on CECD as a case study. Furthermore, given the wide range of these challenges, a PESTEL analysis will now distill and clarify the key external factors influencing CECD's operations (Citilci & Akbalık, 2020, p. 67)

2.1.1 PESTEL Analysis

To better comprehend the future of the landscape in which CECD operates, it is fundamental to examine current market trends from a PESTEL point of view. This framework facilitates a holistic evaluation of the Political, Economic, Social, Technological, Environmental, and Legal environment. Systematic examination of these dimensions enables organizations to anticipate the external sources of threats, identify opportunities, and align their strategy based on market and regulatory movement. Furthermore, it will help CECD to position itself in today's complex

and dynamic environment by considering the diversity of the profile of the people they support, while maintaining flexibility.

Table 2: Pestel Analysis, Political part

Political	<ul style="list-style-type: none"> - In 2024, PISS must demonstrate annual commitment as required by the government. - Decree-Law 54/2018 mandates annual reporting of results and initiatives. - Law No. 13/2023 may prompt revisions to employee trial periods and employment practices.
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Source: own elaboration

The comprehensive course of the political situation in 2024 emphasizes how important for the government is still that entities such PISS demonstrate annually their commitment. In order to do so, PISS, which is willing to remain unchanged, should follow the Decree-Law 54/2018 that states specifically how every year SE should report their result and initiatives through a detailed document. Finally, it is suggested that PISS will have a better look at Law No. 13/2023 that could potentially ask such an entity to revise rules on trial period for new employees and overall adjustment on employment practices.

Table 3: Pestel Analysis, Economic part

Economic	<ul style="list-style-type: none"> - PISS accounted for 3.2% (€5.5 billion) of national GVA and 243,000 full-time jobs in 2020. - Economic uncertainty in 2025 may slow third sector growth. - Inflation (2.3%–2.7%) will likely raise costs and reduce purchasing power.
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Source: own elaboration

At first, looking a 3.2% (€5.5 billion) on the national GVA (Gross Value Added) generated by PISS in 2020 and 243 thousand full-time jobs covered (Portugal Social Innovation Report, p.48, 2020) could be seen as promising data but the economic uncertainty prospected for the year 2025 could potentially limit the growth of the third sector. The inflation is expected to be between 2.3% to 2.7%, meaning that there will be a rise in operating costs and less purchasing power. For this reason, it is strongly advised to PISS to prepare reports such as certified financial account, proof of solvency, and co-funding capability (ability to cover costs) to safeguard intervention of the Recovery and Resilience Plan (PRR), the Institute for Employment and Professional Training (IEFP) and the European Social Found (ESF+).

Table 4: Pestel Analysis, Social part

Social	<ul style="list-style-type: none"> - “Accessible Vote” initiatives improve social integration and equal voting rights for individuals with disabilities. - APPAD reports 65% of individuals with IDD facing social isolation, leading to depression and anxiety - With more entities in the third sector, talent retention strategies are becoming increasingly important
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Source: own elaboration

The “Accessible Vote” initiative makes a crucial difference in the current social Portugal sector as it fosters the integration of individuals with disabilities into society, ensuring equal voting rights and participation. However, challenges persist as it’s indicated by a survey from APPAD showing that 65% of individuals with IDD face significant isolation and successively also depression and anxiety. For this reason, it suggests to entities such as CECD to find new synergies among their activities and partners to target new solutions and community. Additionally, due to the incremental number of entities in the Third sector it is advised to find a way to retain talent.

Table 5: PESTEL Analysis, Technological part

Technological	<ul style="list-style-type: none"> - AI-driven care solutions (e.g., IBM Watson Health) enhance personalized support, from voice control to health monitoring. - Improved CRM systems help social entities analyse patterns and advance digital transformation efforts.
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Source: own elaboration

The future of the technology for IDD seems to be among Ai-powered service. Where the life of an individual is assisted by personalized care solutions like IBM Watson Health from voice-controlled devices to health monitors (Smart Home for All Initiative, p.10,2023). In addition, organizations like Floreo have shown how virtual reality and augmented reality applications help children with autism strengthen their social skills. Finally, practices such as CRM systems have helped many social entities to better analyze the current pattern, this is why it is suggested that PISS start with this as a digital transformation.

Table 6: PESTEL Analysis, Environmental part

Environmental	<ul style="list-style-type: none"> - Sustainable initiatives strengthen PISS’s social and environmental commitment - ESF+ and PRR provide added support for social sector entities adopting these measures
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Source: own elaboration

To be key players in the social progress, sustainable practices are vital for PISS. By adapting measures such as renewable energy, efficient waste management, and eco-friendly initiatives are in practice demonstrating how their commitment is not just related to individuals with disabilities but also care about the environment. Nevertheless, entities such as ESF+, PRR support even more firms in the social sector that respect sustainable practice, for this reason it

is recommended to continue cultivating sustainable initiatives in their basket of activities (European Commission, 2023, p. 5).

Table 7: Pestel Analysis, Legal part

Legal	<ul style="list-style-type: none"> - CNPD intensifies GDPR compliance audits for PISS - Law No. 39/2024 enforces stricter quality and accreditation standards.
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Source: own elaboration

Due the sensitive area in which social enterprises operate, the National Data Protection Commission (CNPD) decided to intensified audits of PISS to ensure GDPR compliance, focusing on secure data. Moreover, the ESF+ with the operational programme for 2023-2027 ask to PISS to demonstrate compliance with anti-discrimination and equal opportunity legislation to maintain funding. In conclusion, stricter quality and accreditation standard are demanded with the Law No. 39/2024 to social enterprises. Given the overall Legal framework, is counselled to PISS and so for CECD, to better look at incremental legal document.

2.2. Object of Study Characterization: CECD

This section provides a CECD overview by analysing four fundamental characteristics: CECD’s history and strong commitment to its mission and vision, the wide range of services offered through its seven areas of intervention, a financial overview of the organization and sustainability strategies to secure long-term success.

2.2.1. History, mission and vision

In 1976 CECD, Centro de Educação para o Cidadão com Deficiência, first opened its doors based on the mission of providing solutions and advocating for the rights of individuals with intellectual disabilities, helping them to find a high-quality life. Forty-eight years have passed, and CECD continues to fulfill its mission currently serving more than 1500 individuals of all

ages. CECD's vision is "to be a reference organization in an inclusive society, promoting equality while respecting difference" (CECD Activity and Account Report, 2023, p. 14).

As an organization, establishing a clear set of values is crucial. Organizational values contribute to a positive organizational culture, inspire employees, and align efforts toward shared objectives. CECD has established 13 values, which are part of its core identity and have enabled the organization to achieve remarkable *(please see Appendix 1: CECD'S Organizational Values)*. Although all these values reflect CECD's focus on inclusion and social impact, not all have the same influence in driving the organization's mission. A more targeted approach that highlights key values such as Cooperation, Professionalism, and Optimisms may provide greater clarity and focus.

To ensure quality and continuous improvement in the solutions and services CECD's offers, the organization works under the European Quality in Social Services (EQUASS) certification, focused on promoting the modernization of social service and guaranteeing the quality standards of the European Region. The EQUASS certification emphasizes 4 different aspects. First, the importance of placing the client's needs and preferences as the center of the organization's ideas. Secondly, to maintain a high standard of ethic conducts and work levels. Also, being responsible and transparent to the quality of the service provided. Lastly, embracing and implementing newer technology fostering growth and improvement in service delivery. In Portugal EQUASS is represented by the Portuguese Association for Quality (APQ). The CECD's quality principles are leadership, human resources, rights, ethics, partnerships, participation, customer orientation, scope, guidance for results and continues improvement, as highlighted in *Appendix 2: CECD 10 quality principals based on EQUASS*.

All strategies created and developed by the organization for the year 2024 are based on three strategic axes: community, innovation and sustainability (CECD Budget and Activity Report

2024). These axes align with CECD's responsibility to offer and provide a solution to society members, especially the ones who reside in Sintra and have intellectual disabilities.

The organization recognizes the importance of strengthening relationships within the local community as a foundation for its activities. This is clear in their strategic objectives in CECD Budget and Activity 2024, which includes managing partnerships strategically, consolidating the hybridization model, and customizing services to meet the specific needs of beneficiaries. Simultaneously, CECD aims to improve its internal strategies, processes, and procedures in order to have an inclusive and supportive environment that strengthens community members' sense of collective belonging.

Innovation also plays an important role for CECD, considering evolution to digital transformation and developing social projects and business which is critical for diversifying revenue streams and reducing the dependence on state funding.

Initiatives regarding sustainability include improving the organizational culture to better support staff and beneficiaries, valuing human talent, and measuring social impact. Furthermore, ensuring strong financial control and developing energy efficiency initiatives will help to secure the organization's long-term resilience and sustainability in an ever-changing social and economic landscape.

Sustainability also plays a crucial role in CECD's strategic plan. Initiatives in this area include improving the organizational culture to better support staff and beneficiaries, valuing human talent through training and development, and implementing systems to measure social impact. Additionally, financial control mechanisms are being strengthened to maintain efficiency and accountability, while energy efficiency initiatives demonstrate CECD's commitment to environmental stewardship. Together, these efforts aim to ensure the long-term resilience and sustainability of the organization in an ever-changing social and economic landscape.

2.2.2. CECD's Business Portfolio

CECD offers seven areas of interventions to members of the community that have any type of intellectual disability, as detailed in *Table 8: CECD'S 7 Areas of Intervention*. Each division plays a critical role in addressing specific challenges, from educational and employment to health care and housing. However, the wide range of services also presents challenges in terms of resource allocation and financial sustainability.

Table 8: CECD'S 7 Areas of Intervention

Area of Intervention	Mission or Purpose
Special Education	Includes the area of Early childhood intervention (IPI) and inclusion resource center (CRI). Together they provide an educational service for children 0 until they are old enough to leave school.
Professional Formation Center (CFP)	Is a project certified by Portugal's Directorate General of Employment and Labor Relations (DGERT). Offer programs for individuals with disabilities aged 18 and older focused on enhance personal, social and relational skill with a plenty of outside activity.
Protected Employment Center (CEP)	Also known as Curva Quatro – one of the most important ongoing projects, that promotes independent living through employment opportunities in key business areas: Gardening, Ornamental Plant Nursery and Laundry . Nevertheless, in this case study will be just further explored Laundry and Ornamental Plant Nursery as Gardening has reached its full working capacity

Residential Units	A housing complex with two buildings that provides a roof and shelter to 25 people with intellectual and development difficulties. The mission is to encourage personal autonomy and quality of life.
Home Support Services (SAD)	Personalized care provided to elderly or disabled people. SAD assist clients with their daily task, emotional support and collaborates with their family member.
The Occupational Activities Center (CACI)	Designed for people with disability with 16 or more years. The purposed of this area is to focus on creative and well-being activities to promote, inclusion, determination and self-love.
Clinic of Medicine and Rehabilitation (CMR)	CMR provides services in the areas of psychology, speech therapy, physiatry, physiotherapy, nutrition and more to any individual that needs assistance in any of these areas. The clinic has a highly qualified and trained staff for this type of services.

Source: CECD Annual Report 2023

The Protected Employment Center (CEP) stands out due to its tangible impact and innovative approach. Unlike other areas, CEP directly helps people obtaining economic independence through employment in ornamental plant nurseries, laundry services, and gardening. Although some of these sub-areas face financial challenges, the gardening service operates profitably as emphasized in 2.2.3 Financial Overview of CECD, showcasing the potential for sustainable growth. Additionally, CEP shows how CECD goes beyond traditional care models and actively integrates beneficiaries into the labor market. This focus promotes individual empowerment and lowers dependency on public funding, aligning with CECD's

strategic axe of innovation. Furthermore, for the future, ensuring the promotion of CEP is essential because it generates revenue withing CECD's range of activities, allowing the income generated – like the gardening unit – to be reinvested across the other initiatives. On top of that, by highlighting tangible results, such as stable business operations and benefit from economic tasks, CEP demonstrates not only the efficacy of CECD's model but also builds further trust, transparency and credibility with both partners, and community.

2.2.3 Financial Overview of CECD

A Non-profit organization is an “*A legally constituted group organized for purposes other than generating profit and in which no part of the organization's income is distributed to its members, directors, or officers.*” (Oxford Dictionary). While these organizations can generate revenues through earned income, they rely heavily on external funding like government grants and donations and are expected to reinvest their surplus to sustain their operation. This makes financial sustainability challenging as it requires generating sufficient revenue to support projects that fulfill the organization's mission, goals and objectives. A structured approach to this challenge involves focusing on the four pillars of financial sustainability (*please see Appendix 3: Four Pillars of Financial Sustainability*).

CECD Funding Composition

Based on the file shared by the organization when applying to the Social Leapfrog Program and containing financial data from 2019, 72% of CECD's funding arises from Public Funding, 25% is generated through Own Revenues, 2% from Private Funding, and 1% from European Funding. Assuming this distribution remained constant over time, this structure highlights CECD's proactive approach to income generation (*please see Appendix 4: Graph 1: CECD's Funding Composition 2019*).

Within the 72% of public funding, the same document specifies that 37% comes from *Segurança Social*, 17% from *Instituto de Emprego e Formação Profissional* (IEFP) and 17%

from other sources, like *ministério da comunicação, câmara e freguesias* (Please see Appendix 5: Graph 2: CECD's Public Funding Composition 2019).

CECD's own revenues are generated from sales and service, which have been increasing from 2021 to 2023, reaching 1 154 306 euros in 2021, 1 316 346 euros in 2022 and 3 127 852 euros in 2023, which corresponds to an approximate increase of 171% from 2021 to 2023, please see Appendix 6: Graph 3: Income Statement – Sales and Services. (CECD Activity and Account Report, 2023, p. 54 and CECD Activity and Account Report, 2022, p. 22)

The value of sales and services comes from CECD's 3 social business: Laundry, Construction and Maintenance of Green Spaces (Gardening), and Nursery. Graph 4: CEP Sales and Services Volume (please see Appendix 7: Graph 4: CEP Sales and Services Volume) indicates that Gardening is the most stable and impactful social business, achieving sales of 628,554 thousand euros in 2023, an increase of approximately 27% compared to 493,808 thousand euros in 2021.

The Laundry also registered strong growth, with an increase of approximately 88% from 2021 to 2023, rising from 57,882 thousand euros in 2021 to 108,983 thousand euros in 2023. However, it is important to note that these values remain considerably low, and further improvements are needed to achieve long-term sustainability.

Last but not least, the Nursery requires a lot of attention since it faces higher financial sustainability difficulties. Sales decreased by about 30% from 48,044 thousand euros in 2021 to 37,992 thousand euros in 2022. However, from 2022 to 2023, sales rose by 56%, reaching 59,421 thousand euros, showing some recovery, please see Appendix 7: Graph 4: CEP Sales and Services Volume. (CECD Activity and Account Report, 2023, p. 33, CECD Activity and Account Report, 2022, p. 32 and CECD Activity and Account Report, 2021, p. 30).

Finally, private funding includes small donations and strategic donations from sources such as companies. European funding mostly refers to the European Social Fund, the European

Union's main mechanism for investing in people and promoting the implementation of the European Pillar of Social Rights.

Financial sustainability analysis of CECD

To better assess the financial sustainability of CECD's two ratios will be analyzed based on information gathered from the CECD Activity and Account report of 2023 and 2022: The autonomy ratio, and the general liquidity ratio (*Please see Appendix 8: Graph 5: CECD's Financial Autonomy*).

The autonomy ratio measures the proportion of a company's equity in relation to its total assets. This ratio remained approximately constant at 58% between 2021 and 2022, then increased by 5.67 percentage points in 2023, reaching 63.67%. This increase highlights CECD's strong ability to meet its financial responsibilities without relying on outside funding, as evidenced by the fact that equity capital continues to support it.

The general liquidity ratio indicates the organization's ability to cover short-term debts and is calculated by dividing the current assets by the organization's current liabilities. CECD registered in 2021 a liquidity ratio of 203.11%, which increased by 20.22 percentage points by 2023, reaching 223.33%. This value demonstrates that CECD's current assets surpass its current liabilities, suggesting a strong capacity to meet its short-term and long-term debts.

Net income analysis: overall

CECD's financial performance from 2020 to 2023 exposes fluctuations in net income, driven by changes in both total revenue and costs.

The organization demonstrated resilience by improving its revenue base and controlling costs, ultimately achieving increasing profitability in the later years. This suggests that CECD has strengthened its financial position, which may contribute to greater stability and future growth.

In 2020 CECD generated a total revenue of approximately 4,736 million euros, with costs amounting to 4,587 million euros, resulting in a positive net income of approximately 70 million euros. However, in 2021, the total revenue generated decreased by approximately 1% to 4,704 million euros, while costs increased by approximately 4% to 4,780 million euros, ending the year with a negative net income of about 146 thousand euros. This shortfall in the revenue generated was not sufficient to cover all expenses. From The Account and Activities Report from 2021 is possible to understand that this is mainly due to COVID-19 related challenges, including difficulties in forecasting the easing of restrictions under various states of emergency, ongoing requirements to follow public health guidelines for purchasing safety equipment, and a decrease in billed fees due to patient absences and missed appointments, while fixed costs largely remained stable or even increased.

In 2022 CECD's total revenue increased by approximately 7% compared to 2021, reaching 5,054 million euros, while costs remained relatively constant at 4,792 million euros. This improvement resulted from a post COVID-19 recovery scenario, specifically from reopening to the outside and an increase in services provided to third parties, ending the year with a positive net income of approximately 168 thousand euros.

In 2023 CECD's total revenue increased by approximately 9% from 2022 to 2023, reaching in 2023 5,549 million euros, while total costs increased by about 8% during the same period, totaling 5,230 million euros, which led to a final positive net income of approximately 260 thousand euros. Furthermore, according to the Account and Activities Report from 2023 CECD had projected a financial loss of about 182 thousand euros due to wage increases, building maintenance and repairs, and rising energy costs. However, the organization achieved a positive surplus of around 260 thousand euros, mainly through increased revenues rather than cost reduction, *please see Appendix 8: Graph 5: CECD's Financial Autonomy, Appendix 9:*

Graph 6: CECD's Revenues and Costs (2020-2023) and Appendix 10: Graph 7 supporting data and calculations.

Conclusion of financial overview

The CECD's financial analysis reveals the organization's flexibility and resilience in managing difficult situations while preserving financial sustainability. CECD has proven that it is capable of generating a steady income to sustain its operations mostly through public funding currently 72% and its own revenue streams currently 25%. The consistent growth in revenue from its social business, in particular gardening, highlights CECD's strategic focus on income generation. However, to improve long-term sustainability attention must be given to the Nursery business since it is underperforming, and it is an opportunity to become a more significant contributor to CECD's overall revenue and reduce dependence on public funding.

Additionally, the organization's increasing autonomy and liquidity ratios highlight strong financial health and the ability to meet short-term and long-term obligations.

Net income fluctuations from 2020 to 2023 showcase how external events, like Covid-19 can significantly impact organizations. Remarkably, through improved revenue generation and effective cost control, CECD was able to successfully mitigate these effects. CECD's operational resilience is further highlighted by achieving a notable income improvement in 2023, despite projected losses for that year.

In conclusion, CECD is well-positioned to maintain and enhance its financial sustainability. Nevertheless, continuing to focus on income diversification, cost management, and growth in underperforming segments will be crucial to sustaining its mission and objectives. This project is going to focus on a comprehensive analysis of CECD's strategic business unit from Protected Employment Center. The profitability of these business units is crucial to reducing CECD's dependence on public funding and ensuring long-term viability.

2.2.4 Stakeholder Identification

According to Freeman (1984), a stakeholder can be understood as “Any group or individual who can affect or is affected by the achievement of the organization's objectives”. In a nonprofit organization scope, one can derive the presence of many different stakeholder groups (Ebrahim, 2010). When managing a pool of stakeholders contributing with financial resources (money), but also human (volunteering) resources, the nonprofit leaders find pressure to “maintain a healthy balance between meeting the demands of powerful stakeholders”, while working to “ensure the representation of less powerful ones in organizational decision” (Schubert and Willems, 2020). In this sense, a clear identification and understanding of stakeholders is an important step for defining target groups for strategies. By doing so, effectively targeted strategies enable an improved organization’s stakeholder governance, and ultimately secure long-term support from these parties for the association.

CECD identifies the following 5 main groups of stakeholders (CECD *Sistema de Participação dos Clientes, Colaboradores e Outras Partes Interessadas*, 2013):

Clients - As observed previously, the cooperative aims to improve the lives of children, students, youth, adults, and the elderly, with IDD (Intellectual and Development Disabilities) and multi-deficiency. The clients can be internal, which are the direct beneficiaries, and external, which include commercial partners, children, students, etc. The company possesses 291 internal clients, and 1280 external ones (CECD Activity and Account Report, 2023). According to the Charter of Rights and Duties of CECD, the cooperative provides clients the right to self-determination, autonomy, and decision-making, "as long as these actions do not present serious, foreseeable, and imminent real or potential risks to the individual or others".

Employees - Under the 2023 annual report and accounts, the organization has 209 employees in total, with a satisfaction rate of 80%. According to its organizational structure,

CECD holds three dimensions: the strategic-oriented level, the management level, and lastly the operational level. Additionally, it looks forward to access satisfaction and ways to improve, having initiatives such as “Banco de Ideias” (Idea Bank) and “Propostas de Melhorias” (Improvement Proposals) to promote a better working culture.

Families and Significant Others - Included in the indirect beneficiaries, this group plays an active role in the elaboration of the “Plano individual de Cuidados” (Individual Care Plan), which objectively evaluates the needs and expectations of the direct beneficiaries. On the other hand, the client's parents are a majority stake in the organization's Board - four out of seven elements. In this sense, they are involved in decision-making about the activities to be carried out.

Partners and Funding Entities:

Partners - A party that the institution states are crucial for the “survival” of any institution (CECD, 2013). One can find as partners health centers and hospitals, nurseries, kindergartens, schools and universities, social security in its local networks; local authorities; supervisory bodies, other private institutions of social solidarity, federations, international associations, among others. These synergies contribute to a higher availability of resources and an optimization of the services, leading to better results in terms of social intervention impact.

Funding Entities - Comprise public contributions (72% of funding), private contributions (2%), European Financing (1%), and own revenue source (25%) (*Please see Appendix 4: Graph 1: CECD's Funding Composition 2019*).

Cooperators - Clients of CECD who are not occasional. The title of cooperator consequently guarantees them the right to vote in the institution's General Assembly, being involved in the planning and development of the services and programs.

Upon examining CECD's pool of stakeholders deemed relevant to fulfilling its mission, a deeper analysis of their relationship with the institution can be conducted, in order to answer the study's focus of identifying difficulties and exploring strategic and tactical solutions to effectively convey CECD's service portfolio and social mission.

2.3 CECD: Current Marketing Assessment

Effective stakeholder identification lays the groundwork for any NGO marketing strategy, providing a foundation to address its current challenges and explore strategies that may encourage stakeholder engagement through online presence and digital communication initiatives. For many NGOs, marketing is becoming essential to achieving mission-driven goals, "while there is general agreement that NGOs have a greater need for marketing than they did 30 years ago, there is little agreement on how NGOs should approach marketing." (Pope, Sterrett Isely, and Asamoah-Tutu 2009: page 190)

CECD's Marketing employee when asked about motivations for developing a marketing department noted, "*The greatest challenge was recognizing and making recognized marketing not as a luxury but as an essential element*" - CECD Employee.

Many NGOs face significant challenges in marketing due to resource constraints, undervaluation of its importance, and the absence of structured approaches. These limitations often lead to tactical efforts that are, more often than not, fragmented, tend to lack strategic focus and prevent organizations from meaningfully engaging with their stakeholders and conveying their impact.

This chapter will examine the importance of marketing in NGOs, highlighting its challenges and opportunities, before assessing CECD's current marketing context. A detailed situation analysis, using SWOT and TOWS frameworks, will provide insights to develop strategies that align with CECD's current marketing condition and strengthen and better inform the organization's efforts.

2.3.1 Assessment of Marketing in the Non-Governmental Organizations Sector (NGO's)

A well-resourced marketing team is critical in industries like social services, where openness, trust, and constant communication are critical with a present demand for responsibility, regulation, and (Baynast et al. 2018). Unlike some commercial organizations, NGOs rely heavily on their ability to communicate their impact, coordinate mission-driven messaging, and cultivate trust among diverse stakeholders as partners, donors, and clients. However, many NGOs still undervalue marketing, often viewing it as an auxiliary function rather than a critical enabler of their mission. Research further supports this, showing that organizations with active marketing campaigns see significantly higher community engagement rates (European Social Enterprise Monitor, 2023, p 14). Digital tools are transformative, with video content achieving a 66% higher engagement rate than text-based formats (Video Marketing Insight, 2023). This combination of innovative approaches and resourceful storytelling ensures that NGOs can effectively engage stakeholders, secure sustainable growth, and amplify their social missions.

Historically, marketing within NGOs was limited to fundraising efforts, often disconnected from broader organizational goals. However, as societal expectations for transparency and accountability have grown and there have been many technological developments, NGOs have increasingly recognized the need to engage stakeholders through more structured and impactful communication strategies. Despite this progress, many NGOs still struggle to define marketing in a way that aligns with their unique objectives. As the NGO's Marketing Specialist interviewed noted, *"Various NGOs present difficulties in clearly explaining what they do and their impact, which affects the public's engagement. Strategies like storytelling and developing clear positioning strategies help create meaningful relationships with the respective stakeholders"*.

But why do NGOs struggle so much to convey their mission and values within marketing parameters and structures, especially when marketing has a proven impact on stakeholder engagement and community connection? The answer lies in the multitude of challenges that NGOs face in adopting and integrating effective marketing strategies. As noted, *“Lack of money was the most popular reason for problems with marketing, followed by lack of staff, lack of time, and lack of marketing skill sets”* (Pope, Sterrett Isely, and Asamoah-Tutu 2009: page 192).

One of the biggest challenges is the lack of dedicated marketing resources. This includes financial constraints, insufficient staff, and limited expertise in leveraging modern tools. As highlighted in the interviews with the Marketing CECD employee for 6 months, *“Lack of human and financial resources are the most significant barriers...”*.

This aligns with research showing that non-profit organizations often depend on volunteer-driven or immediate purpose and impact marketing efforts, which need more consistency and reach of professional campaigns (Yee and Yazdanifard 2015). This reliance on volunteer-driven or short-term marketing efforts often leaves NGOs unprepared to fully embrace the potential of digital tools, despite their growing recognition as essential in driving stakeholder engagement and visibility. While digital tools are increasingly recognized as essential, many NGOs struggle to implement them effectively. The 2023 Digital Engagement Study revealed that social media and newsletters can boost stakeholder interaction by 40%, yet NGOs often lack the expertise or resources to capitalize on these opportunities. As a Marketing CECD employee for 6 months emphasized, *“SEO is not expensive, and investing €50 in a Facebook campaign can yield significant returns if well-targeted and strategized.”*

Despite the affordability of such tools, many organizations lack the structured approach needed to maximize their potential.

Based on previous analysis it becomes possible to infer that marketing has evolved into a vital pillar for NGOs, bridging their mission with effective stakeholder engagement. However,

challenges such as resource constraints, undervaluation, and a lack of structured approaches persist, affecting their ability to communicate their impact and build trust. NGOs can overcome these barriers by leveraging storytelling, digital tools, and strategic alignment, achieving greater stakeholder engagement and sustainable growth. Embracing marketing as a core function, rather than an auxiliary task, is key to amplifying their social missions effectively.

2.3.2 CECD's Current Marketing Contextualization

The analysis of CECD's current marketing approach draws on insights from primary data collected directly from interviewing key stakeholders, a detailed review of their online platforms and services, and their branding and stakeholder engagement efforts. This comprehensive assessment will highlight how CECD's challenges reflect broader trends observed across the NGO sector, providing a deeper understanding of the obstacles faced and potential strategies for improvement.

One of the most pressing challenges identified in this analysis is the organization's limited marketing capacity due to resource constraints. The Marketing CECD Employee for 6 months highlighted, *"The marketing department at this time has only two people, both working part-time,"*.

This clearly makes it difficult to meet the demands of the challenging NGOs marketing characteristics. This lack of human resources, coupled with limited financial investment in marketing, restricts CECD's ability to implement consistent and impactful campaigns, leaving its efforts fragmented and tactic responding only to immediate purposes not being sustainable in a long-term, strategic. Similar challenges are evident across the NGO sector as previously noted. CECD's struggle to transition from immediate, small-scale initiatives to a cohesive marketing strategy reflects the broader difficulties faced by NGOs in leveraging marketing as a critical enabler of their mission.

Compounding these external resource constraints are internal perceptions of marketing. At CECD, marketing is often seen as a supplementary activity rather than a fundamental component of its organizational strategy. As stated, when analysing the NGO sector, even though there has been an evolution, marketing is typically viewed as a secondary focus rather than essential. This undervaluation not only limits the organization's ability to position marketing as a strategic tool but also creates significant barriers in internal communication. One issue noted by the Marketing Coordinator is the difficulty in communicating internally that marketing is an essential function, rather than a non-critical expense. This lack of internal alignment further complicates efforts to integrate marketing into organizational goals, resulting in fragmented efforts that impede CECD's capacity to strengthen stakeholder relationships and enhance its overall impact.

The absence of a strategic marketing plan presents itself as a critical weakness for CECD, as highlighted during the interviews (*Please see Appendix 11: Comparative Insights from CECD Marketing Employee and NGOs Marketing Specialist Interview Questions, Main areas of Consensus and Main areas of Divergences*). Initiatives like the "Pirilampo Mágico" campaign showcase potential for community engagement but lack strategic focus and scalability, even though the campaign is divided throughout different "Cercis". The organization also does not utilize a feedback loop to measure and evaluate the effectiveness of its initiatives, which could provide valuable insights for improvement. As CECD employee for 15 years remarked, *"If there is no plan, then perhaps it is better not to do it at all."*

This reflects a broader issue within NGOs, where marketing efforts often lack the consistency and strategic criticism and thinking required for sustained impact. The reliance on tactic efforts, once again, further exacerbates this challenge, with CECD depending heavily on personal interactions for fundraising.

Directly related to this lack of structure is the organization's limited digital adaptation. CECD's digital presence relies primarily on organic social media posts, which restrict its ability to engage new stakeholders effectively. Cost-effective tools like SEO and targeted social media campaigns remain underutilized, despite their potential to deliver significant returns, as noted by the Marketing Specialist. Moreover, the absence of a dedicated website donation page highlights gaps in digital infrastructure, further incapacitating stakeholder engagement and eventual fundraising efforts. Together, these challenges underscore the need for both a structured marketing strategy and a stronger digital presence to align CECD's efforts with sustainable, long-term goals.

CECD's current marketing challenges align closely with the broader issues faced by NGOs, including resource constraints, undervaluation of marketing, and a lack of strategic planning. The reliance on fragmented efforts, limited digital adaptation, and the absence of a feedback loop reflect common barriers within the sector. Addressing these challenges requires a shift toward structured marketing strategies and digital tools, which would enable CECD to transition from reactive, short-term initiatives to sustainable, mission-driven marketing efforts.

2.3.3. Situation Analysis (SWOT and TOWS)

To better understand and address these challenges, a comprehensive situation analysis is essential. The situation analysis serves as a foundational step in defining a strategy, as it provides an in-depth understanding of the various interconnected aspects that have an external or internal connection with the organization and consequent impact (Baynast et al. 2018). By applying SWOT and TOWS frameworks, CECD will gain deeper insights into its internal strengths and weaknesses, as well as external opportunities and threats. These tools will provide a strategic foundation for developing actionable solutions that align with the organization's mission and enable long-term, sustainable marketing efforts. The SWOT analysis is a strategic tool used to assess an organization's current state by examining the internal and external

elements that affect its performance, and there are four main elements that form the framework of analysis (Baynast et al. 2018), while the TOWS framework is a further enhancement of the SWOT analysis that develops operational strategies by relating internal strengths and weaknesses with external opportunities and risks. Considering the following table let's combine the set of characteristics identified in the SWOT to develop beneficial strategic actions:

Table 9: SWOT Analysis, Strengths

Main Strengths	<ul style="list-style-type: none"> - Specialized Expertise and Decades of Experience - Diverse Service Portfolio - Innovative Income Generating Initiatives
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Source: own elaboration

When talking about strengths with an internal focus, CECD clearly distinguishes itself with its over four decades of service to individuals with qualified staff who understand and meet their beneficiaries needs. Aligned with this, they provide eight areas of intervention allowing for the tackling of diverse client needs while combining its services with a set of social businesses with creative projects such as "Feito à mão com mil afetos" demonstrating its ability to combine beneficiaries needs, with social impact and financial sustainability and diversification.

Table 10: SWOT Analysis, Main Weaknesses

Main Weaknesses	<ul style="list-style-type: none"> - Limited Marketing Resources - Underdeveloped Digital Presence - Lack of feedback mechanisms and strategic evaluation
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Source: own elaboration

Still from an internal perspective, CECD presents various difficulties and strategic problems that undermine and difficult its long-term growth and sustainability. As one of the most

groundbreaking problems found was lack of marketing resources starting with a very small team of employees consisting of only two part-time employees limiting CECDs ability to implement and develop informed strategic decisions while impacting negatively engagement on their digital platforms, limiting also their reach to respective stakeholders and community. As a foundation of both the problems stated just before the team also found no structured feedback loops preventing, even further, the organization's capabilities of assessing its initiatives and taking more informed decisions with clear data and insights.

Table 11: SWOT Analysis, Main Opportunities

Main Opportunities	<ul style="list-style-type: none"> - Digital Marketing Advancements - Growing Societal Focus on Inclusion - Technological Innovations
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Source: own elaboration

Moving to an external perspective, there have been increasing advancements in digital strategies such as social media and SEO, providing and facilitating their access to organizations that may leverage these options to develop their visibility while seamlessly engaging different stakeholders. Due to globalization and more information on a day-to-day basis, there’s also been a growth on society’s focus on inclusion, raising more awareness of disability and inclusivity topics allowing for CECD to align with this and strategically position itself as a leader organization in supporting these individuals. Aligned with the first opportunity, there’s also been advancements in assistive technologies as highlighted in the “PESTEL” sector, opening doors for the organization to modernize itself and their service offerings.

Table 12: SWOT Analysis, Main Threats

Main Threats	<ul style="list-style-type: none"> - Economic Instability and Funding Cuts - Competition from Tech - Savvy Organizations
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	- Perceived Transparency Issues in the Sector
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Source: own elaboration

Still from an external perspective, and once again as highlighted in the economic perspective of the “PESTEL”, there’s economic uncertainty that may potentially limit the growth of the third sector, aligned with factors such as inflation government budget reallocations, increasing costs for energy and materials, which may very well present themselves as a risk to CECD’s financial sustainability. Also, as there has been a clear growth in the technological sector, some organizations are adopting these advances and digital tools to differentiate themselves which may leave CECD at a clear disadvantage. Lastly, stakeholder confidence must be perceived as one of the most important goals of an organization, but even if CECD acts ethically, the perceived confidence in the NGO sector may affect and impact negatively the organization.

The combination of Limited Marketing Resources (Weakness) and Digital Marketing Advancements (Opportunity) implies the most cost-effective solution for these challenges lies in leveraging digital marketing tools, for example, SEO and targeted social media campaigns. By adopting this approach, CECD can maximize its outreach while working within the constraints of its small marketing team. Research supports this direction: “The development of digital marketing using Internet technology and social media nowadays provides new opportunities for the marketing activities of NGOs” (Yoon, 2024). Affordable campaigns on platforms like Facebook and Instagram can amplify CECD’s messaging with minimal resource investment, making it an ideal strategy to achieve sustainable and impactful engagement.

The combination of Specialized Expertise and Decades of Experience (Strength) and Competition from Tech-Savvy Organizations (Threat) implies the use of CECD’s expertise to develop innovative services and digital partnerships. CECD’s rich history and in-depth knowledge of beneficiary needs position it to innovate by adopting emerging assistive

technologies. Collaborations with tech-savvy partners can help CECD modernize its offerings and maintain competitiveness without extensive internal resources.

The combination of Underdeveloped Digital Presence (Weakness) and a Growing Societal Focus on Inclusivity (Opportunity) allows to seamlessly integrate presential events with digital communication and feedback loops while enhancing on person events by combining on-site activities with, for example, live-streamed content, social media updates, and post-event surveys to engage online and in-person stakeholders. This approach ensures broader participation while creating valuable feedback mechanisms for ongoing improvements. A hybrid strategy bridges CECD's traditional outreach with its growing digital potential, aligning with inclusivity trends.

Based on this information, it seems the most effective strategic action for CECD's challenges is adopting a digital marketing approach. This strategy leverages cost-effective tools like SEO, social media campaigns, and storytelling to maximize stakeholder engagement while addressing resource constraints. By integrating digital communication with traditional events, CECD can create hybrid strategies that enhance visibility and sustainability. As research suggests, complemented by the opinion of a NGOs Marketing Specialist, "*A well-prepared digital campaign can achieve significant results even with limited resources*". This sentiment is echoed in the literature, which highlights that "traditional marketing strategies are not well-adapted to meeting the goals of NGOs" because they fail to address the unique needs of partners, volunteers, and donors (Pope, Sterrett Isely, and Asamo-Tutu 2009: *page 191*)

Having vision and understanding of the current situation allows for CECD to align its efforts with its mission, opening doors for creatively engaging stakeholders, and optimizes its very limited resources for long-term impact.

3. Study's Methodology (Group Part)

3.1.Data Collection and Sampling

To assess the study problem with primary data, ten semi-structured interviews were performed, six were with CECD's internal (employees, executive directors, board members) and two were with external (partners) stakeholders. Given the complexity of developing an appropriate marketing approach and analysis for the organization and the challenges in understanding the organization's marketing needs, two more specific interviews were conducted. These included a CECD Marketing employee to gain an insider perspective on current marketing strategies and challenges, and an NGO marketing specialist to provide external expert insights.

The sampling selection criteria tried to ensure that respondents were knowledgeable and the right interviewees to collect the necessary data to attain the study's objectives. For internal stakeholders, the focus is on the role and responsibilities, length of service, depth of personal knowledge, department representation, and degree of involvement in partner relations. With external stakeholders, the emphasis is on recurrency of investment and its amount, and level of engagement with CECD's mission. In regard to marketing-oriented interviews, the selection of one marketing employee from the organization was made because it adds to the research a good understanding of the internal marketing operations, decisions and approach, while the selection of an NGO marketing specialist allowed understanding of the NGOs marketing landscape.

Given this, one can showcase the characterization of interviewees, which demonstrates that they satisfy the pre-established requirements and that they are valid and relevant sources of information as highlighted in *Table 13: Characterization of Interviewees*.

It is important to mention that the Social Leapfrog Program is a "*pioneering reflection and capacitation program for social organizations that are, or aspire to be, hybrid (organizations with a clear social mission that also generate their own revenues through the sale of products*

and services).” (Nova SBE). The goal of this program is to make organizations improve their impact and achieve better financial sustainability.

Table 13: Characterization of Interviewees

Interviewee	Years in Company	Why Relevant
CECD employee	35 years	Leading role, awareness on management of HSS operations
CECD employee	6 years	Has direct contact with direct beneficiaries, greater perception of operations in CATI and SE
CECD employee	25 years	Leading role, with a key position in defining strategy, effective governance, and alignment with the institution's goals, awareness on management of RU
CECD employee	5 months	Leading role, awareness on management of CATI operations
CECD employee	11 years	Leading role, strategic view on the development of innovation strategies, project management, collaborations and partnerships, and risk management
CECD employee	15 years	Awareness on management of PEC operations, development of communication strategy among the team, team leadership, business management
CECD employee	6 months	Internal insights to the organizations marketing and communications challenges
Nova SBE – NGO Marketing Specialist	4 years	Offers expertise and perspectives on NGOs practices valuable for CECD
CECD Partner CECD 1	5 years	CECD Partner for 14 years
CECD Partner 2	7 years	CECD Partner for more than 10 years

Source: own elaboration

Furthermore, details on the interviews can be found in the following *Table 14: Interview Details*, where one can observe that all twelve interviews were online, and they had an average time of 45 minutes.

Table 14: Interview Details

Online or Face to Face	Date of the Interview	Duration of the Interview
Online	24/10/2024	40 minutes
Online	31/11/2024	54 minutes
Online	28/10/2024	40 minutes
Online	22/10/2024	1 hour and 15 minutes
Online	28/10/2024	46 minutes
Online	24/10/2024	46 minutes
Online	06/12/2024	36 minutes
Online	06/12/2024	56 minutes
Online	23/11/2024	60 minutes
Online	28/11/2024	32 minutes

Source: own elaboration

The sample size was determined by theoretical saturation, meaning that the objective is to continue gathering data through interviews until data no longer shows any more theories or insights (Creswell, J. W., & Creswell, J. D., 2018, p. 301). Nevertheless, there is a constraint due to the list of participants provided by CECD and, afterwards, their willingness to collaborate. Out of thirteen people who were contacted, a total of ten people (eight internal and two external) were interviewed. In this context, the theoretical saturation requirement set was satisfied when dealing with CECD's internal insights, yet due to the small sample size of the partners, this last data collection presents a limitation. In regard to marketing-oriented interviews, more two interviews were conducted (one CECD marketing employee and one

marketing specialist). The data collected from these additional two interviews and the partners was not enough to satisfy the theoretical saturation requirement.

The collection of documents used as secondary data includes articles in newspapers, official reports, and more (Creswell and Creswell, 2018). Information regarding CECD was accessed through its web page, including details on mission, vision, and business portfolio, CECD Activity and Account Report, CECD Budget Activity Plans Report, CECD Strategic Plan 2023-2026, CECD newsletter: Edição especial Ser CECD | outubro 2016, and an observation of its social media platforms. Furthermore, it was requested and then provided from CECD internal reports on stakeholder identification and partner management, along with a contacts' list of internal stakeholders (employees, executive directors, board members) and external stakeholders (partners), who could be reached to be interviewees for the study. Beyond data about CECD, the analysis is supported by literature reviews in order to infer legitimate conclusions, including studies and frameworks about brand identity and management, NGO's marketing and communication, stakeholder relationship management, operational efficiency on social enterprises and supply chain management, etc, and findings on data collection characterization to fundament the Study's Methodology. Additional secondary data resources comprise information on a similar social institution (Associação Salvador Activity Report, media kit, website, and social media platforms) and financial information that supports the budget projection (i.e. Staples Copy&Print price list report, Parques Sintra price list report, Penha Longa Catering Kit price).

The project used both primary data collection and secondary data analysis. This approach grants a more robust data analysis because it combines the pre-defined knowledge from past research with primary data that allows more flexibility to add new emerging issues.

3.2 Primary Data Analysis through Qualitative Study

For the primary data, it was adopted a semi-structured interview method for both CECD employees and partner interviews and both marketing-oriented interviews. With a mix of predefined questions, informed by the literature review on the topics covered, and unplanned questions, which arise during the interview, this structure provides more flexibility to explore the interviewee opinion.

This approach was selected due to its alignment with the interviewer and project needs, and its level of effectiveness. Interviewing panel already had a clear understanding of the topics to address based on preliminary meetings with CECD leaders about the main organizational challenges and readings from the literature about the topics raised by CECD. On the other hand, the panel preferred not to be limited to a predefined set of questions, leading to the choice of a semi-structured interview rather than a structured one.

On the other hand, with CECD's project problem identified early on, the panel formulated objectives accordingly. Since each objective had a focus on a specific issue, there were created targeted and semi-structured interviews based on those objectives, ensuring that the discussion remained relevant to the organizational challenges that CECD is facing. Furthermore, this instrument allowed participants to express their ideas and opinions freely, also allowing the panel to ask follow-up questions or to rephrase answers if needed.

It is important to clarify that, this work project was entirely focused on the participant's opinion regarding the topic thus, we avoided imposing our own opinions and interpretation in when interpreting the data.

Interviewees were given the flexibility to participate only in the sections they chose and felt comfortable answering. The interviews conducted were recorded and turned into a transcript, to more effectively access these insights, and consequently state clearer conclusions. An exploratory approach was used to gather insights from internal knowledgeable respondents who

pointed at CECD's communication gaps and financial challenges. The exploratory perspective provided a better foundation for refining and evolving the study's objectives, since it uncovers patterns in the data collect. By using an interview guide (*Please see Appendix 12: Interview guide – CECD employees, Appendix 13: Interview Guide – Partners, Appendix 14: Interview Guide – CECD marketing employee & Appendix 15: Interview Guide – NGOs marketing specialist*) the group was able to effectively identify and explore CECD's communication gaps and financial challenges, while having a better comparison between the organization's marketing procedures with the NGOs marketing practices.

3.3 Interview Design

Due to the different nature of stakeholders, four different interview guides were created: for the internal respondents *Appendix 12: Interview Guide – CECD employees*, for the external respondents *Appendix 13: Interview Guide - Partners*, for the marketing employee from CECD *Appendix 14: Interview Guide – CECD Marketing Employee*, and for the NGOs marketing specialist *Appendix 15: Interview Guide – NGOs marketing specialist*. This design method enables to appoint relevant questions to each stakeholder group, thereby facilitating a more targeted and comprehensive response to the defined study questions.

In relation to the structure, the first two interview types, for CECD employees and partners, have sections in common, which are “understanding C.E.C.D Mira Sintra's organizational identity”, “intended C.E.C.D Mira Sintra brand meaning”, “partner retention and challenges”, and “CBBE framework”, however, they are rephrased according to each point of view. The second two, with a clear focus on marketing, show similarities in sections such as, “Marketing Objectives and Challenges of NGOs”, “Target Audience and Stakeholder Engagement”, “Digital Presence and Online Strategy”, “Competitive Landscape and Benchmarking” and “Future Strategies and Recommendations”.

In search to deliver coherent and clear insights, a table template was defined to interpret the interview data. The table states the questions made in the interview, and the respective main areas of consensus and main areas of divergences of the interviewees, as illustrated in the table of *Appendix 16: Partners' interview findings on CECD partnership management: Interview Questions, Main areas of Consensus and Main areas of Divergences.*

3.4 Study Limitations

Some limitations were identified in the methodology of this project. Regarding the information gathered, there is a possibility that insights may be an incomplete picture of reality due to the own bias of participants, there is a level of subjectivity, as they are sharing information through their own personal perspective. Also, the presence of the researcher in the interview may affect the answer provided as they may feel judged or pressured to give a specific answer, and some social desirability effect might be present.

Finally, another limitation was the low response rate to interview requests. Despite reaching out to thirteen stakeholders provided by CECD, ten of them reached back to us and participated in the interview.

4. CECD's Partners Strategy (Individual Part)

4.1. The importance of Partners for a Non-profit organization

One can say that, for CECD, partners are introduced as key parties that sustain the short and long-term survival of a non-profit organization (NPO) – “Partnerships are essential for the ‘survival’ of any institution”. (CECD Partnership Management System, 2013, p. 2). Guided by its core values of Cooperation and Team Spirit, the cooperative proactively seeks synergies to enhance the value of its activities. Beyond providing stability, forming partnerships in a non-profit environment, allows both sides, the institution and the firm, to achieve shared goals. Focusing on the cooperative perspective, a partnership permits support (financial and non-

financial) in the development of its activities, through the creation of new programs or the improvement of the existing services. Moreover, partnering with an established and trusted entity enhances credibility. By collaborating with such a partner, the organization builds trust with its current audience while leveraging its reputation and standing within the community.

CECD states that the establishment of partnerships has the goal of “contributing to the development of good and best practices”, and it shows its commitment, with the partnerships, “to achieve better results in the area in which it intervenes, the area of social intervention.” (CECD Partnership Management System, 2013, p. 2). In this sense, partners are perceived by CECD as a key stakeholder in the organization, and consequently, it becomes relevant to understand the cooperative’s take on maintaining partner relationships. Chaves (2013) suggests that a focused analysis of stakeholder relationships and dependencies is essential for non-governmental organizations to operate efficiently and fulfil their missions.

Thus, it becomes clear that an in-depth study on partner engagement is critical, and one can propose the following objective:

O3: Assess CECD’s current partner engagement practices.

To assess Objective #3, the process of data collection goes through an assessment of the organization’s current practices in this scope, an understanding of the point of view of CECD’s partners on their relationship with CECD through interviews, and an overview of studies that guide how NPOs can enhance their relationship with stakeholders. Lastly, it is stated recommendations that align with the data collected.

4.2 Current Partner Engagement

In 2023, CECD was able to maintain practically the same partnerships as those identified in 2022, amounting to 157. Nonetheless, in the last three years, in terms of event initiatives, the institution was able to do solely one event of “open door to the community”, not complying with the expectation of 6 events in total. In the second semester of 2023, the organization had

only one person in charge of Marketing and Communication, working part-time. In the 2023 CECD Activity and Account report, the department acknowledged a marketing goal of deepening the relationship with some partners (examples: Synthomer, Recipharm, Belas Clube de Campo, Digal, Parques de Sintra, Montepio). However, there is no feedback on the impact of this measure. In November, the department started being restructured, and so is its strategy.

The methodology CECD initially crafted monitors its partnerships by realizing periodic follow-up meetings and a final monitoring event in which it evaluates the partnership and the partner's satisfaction. The partnership evaluation contains quantitative and qualitative information regarding:

- Achieved results: considering the planned indicators, assesses whether the expected results have been achieved.
- Evaluation: Every year, the partnership is evaluated on the degree of compliance with the indicators envisaged when the partnership was formalised.

However, CECD states that currently these “check-ups” are not being conducted. Since the pandemic, the institution's efforts towards its partners have been limited to occasional meetings, held through necessity. In addition, the last moment CECD assessed partner satisfaction was before COVID-19, in 2019, which amounted to 88%. To bring the community together, including partners, CECD has previously hosted Galas. However, these significant events are typically held infrequently and do not fully serve the purpose of showcasing and reflecting on achievements. Yet, CECD's marketing team insights from November 2024, collected through a phone call, enable us to conclude that the institution aims to assess again its partners' satisfaction rates, while strengthening the partner engagement effort.

4.3 Partners' perspective on Engagement with CECD

After covering this notion, it became necessary to collect feedback from the partner's perspective. For this matter, CECD was requested to provide a list of key partners. Out of the

five contacts received, the thesis authors managed to reach and interview two partners, both considered loyal due to the long-standing nature of their partnerships, with more than ten years, as seen in *Table 13: Characterization of Interviewees*. The interviews organized had an average duration of 45 minutes (*Table 14: Interview Details*), and their primary objective was to evaluate whether the institution is responding to the partner needs effectively and understand what these key parties value most in partnerships. From *Appendix 13: Interview Guide – Partners*, it is possible to observe the questions asked to the partners.

The interviews conducted revealed two types of partners, each differing in how they perceive a high-quality relationship in partner-organization management.

The first type of partner can be described as a practical, results-oriented individual who values reliability, accountability, and sustainable impact in their partnership with CECD. This persona prioritizes efficiency and compliance and appreciates the organization's commitment to certifications and strategic planning, viewing these as indicators of long-term reliability – *“for me more than communicating is doing things well to such excellence”, “CECD stands out because they work on certifications, it takes a lot of work to have a certification, it means that it has to be done really well and they do it and have a strategy”* – CECD partner of seven years. While they recognize the role of marketing and online presence, they are less inclined to focus on appearance and prefer communication that is straightforward and centered on tangible achievements – *“our relationship is explained by the merit of the organization, because it is not through a beautiful post on the Internet that there is communication, if there is no substance behind it.”* – CECD partner of seven years. Thus, they consider that a high-quality relationship is built on legitimacy coming from the organization and having an aligned plan. Furthermore, in line with their point of view, the plan should be monitored with just the necessary amount of communication for it to flow, perhaps excluding the need for the web-based accountability factor.

The second type of partner can be understood as more engagement oriented. For them, updates, feedback, and expressions of gratitude for the projects to which they are contributing, are essential for maintaining a meaningful connection – *“there is a lack of regular communication”* – CECD partner of five years. Beyond that, they also value receiving communication on the institution’s initiatives and the impact created, whether they are involved or not, being more inclined in receiving a monthly newsletter. Given this, for this type of partner, a high-quality relationship can be translated into more active communication, that ensures they feel informed and appreciated in the initiatives they participate in, but also well-informed about other work from CECD and the outcomes.

Even though these two types of partners diverge in what they value most in a partnership, they both acknowledge a need to have more direct contact, maintain closeness with CECD. These insights can be structured into a table stating the interview questions and respective main areas of consensus and main areas of divergences (*please see Appendix 16: Partners’ interview findings on CECD partnership management: Interview Questions, Main areas of Consensus and Main areas of Divergences*).

CECD, under the background of the interview, seems to satisfy the pragmatic ones, less the engagement oriented. But there is a point in which they both agree should be a point of improvement, the direct contact. On *Section 4: Partner Campaigns* in the partners interview guide (*Please see Appendix 13: Interview guide - Partners*), when it was asked in the partner’s interview “Are there any communication methods or channels that you think CECD could use more effectively to engage with partners?”, there was a unanimous answer that emphasized improving the proximity – *“there is a lack of regular communication”* *“I think it is more sympathetic to have formal communication, because I cannot convey what is said over the phone, that is, with you.”*– CECD partner of five years; *“Reinforce direct relationship (...) it is about work and relationship”*, *“we maintain contact because we have strong personal and*

institutional relationships (...) but they should know how to maintain those contacts” – CECD partner of seven years.

Following this, CECD’s partnerships can also be evaluated according to quality relationship management frameworks.

4.4 Literature review on stakeholder relationship management

The various conceptualizations of quality relationship management help non-profit organizations identify crucial notions to integrate into day-to-day operations. The following topics address how can a NPO improve its stakeholder relationship:

4.4.1 Legitimacy through transparency and web-based accountability

The first search finding highlights the need for organizations to respond with legitimacy and accountability to guarantee their funding (Andrews, 2014; Atack, 1999; Baur & Palazzo, 2011; Lister, 2003; Ossewaarde et al., 2008). Thus, under this perspective, the organization's legitimacy and accountability are important dimensions in stakeholder relationship management.

The initial approach to the legitimacy of non-profit organizations focuses on documenting and disclosing their intentions and outcomes. According to scholars like Ebrahim (2003) and Najam (1996), NPO legitimacy is often rooted in the morality of their intentions, where simply aiming for social good grants them moral legitimacy. However, this moral legitimacy alone is insufficient to maintain public trust and ensure long-term organizational effectiveness. Lister (2003) argues that for an NPO to evolve from being a morally good idea to a practical and impactful moral pursuit, its legitimacy must evolve to pragmatic. This requires the organization to demonstrate concrete evidence of their effectiveness, in measurable and transparent ways. Thus, the pragmatic side of legitimacy involves the disclosure reports of both financial and social outcomes.

However, according to O'Dwyer & Unerman (2007) and Roberts (1991), the NPO's overseen legitimacy is challenged by the fact that there is a lack of social performance reporting. Thus, there is a need for the organization to discover ways to transmit its social efforts to stakeholders, measurably, emphasizing achievements and progress.

To effectively bridge this gap, Chu and Luke (2021) argue that web-based accountability allows NPOs to improve transparency.

This type of accountability is defined as online mechanisms for reporting, feedback, stakeholder input, and engagement methods aimed at enhancing accountability (Saxton, G.D. and Guo, C; 2009), and includes websites, interactive tools (online surveys, feedback), transaction features for online fundraising, and web 2.0 technologies (social media). Internet-based technologies provide advantages to both non-profit organizations (supply side), and citizens (demand side). On the supply side, institutions can use it to disclose financial and operational data, benefiting from lower costs of stakeholder participation in decision-making. On the demand side, it makes it easier for citizens to obtain information. In regard to reporting social performance indicators, such as achievements and outputs, web-based technologies enable the disclosure of these social outcomes, and further facilitate ongoing dialogue with stakeholders, fostering interaction.

4.4.2 Organizational listening

Shifting the focus from relationships to the individuals and making entities engaged in those relationships as the unit of analysis, *Organizational Listening* (OL) brings a more holistic perspective on how NPOs should engage with their stakeholders. According to Jiawei Sophia Fu (2023), "researchers studying stakeholder engagement and communication have focused on how organizations speak to stakeholders while overlooking how organizations listen to stakeholders."

Organizational listening is conceptualized by Flynn (2008), who emphasized that it “involves hearing and cognition and assumes the ability and behavioural skill to selectively perceive, interpret, understand, assign meaning, react, remember, and analyse what is heard”. Focusing on organizations, OL translates into a form of stakeholder engagement, characterized by active consideration to understand and aptly respond to stakeholders (McNamara, 2018). Closely reaching 500 definitions and theories according to Harlow (1976), public relations theorization enabled OL to be conceptualized, and is based on at least the following five key concepts:

Two-way communication - Organizational listening is deeply rooted in two-way communication models, emphasizing the Excellence theory, which is seen as the public relations’ “dominant paradigm” (L’Etang, 2008; Pieczka, 1996, 2006; Spicer, 2007). The tautology of two-way communication aims to highlight openness, dialogue, and the exchange of ideas, according to thinkers like Gadamer, Bakhtin, and Buber. Even though there is no concept such as one-way communication, one can observe that, in practice, organizations may lack the interaction factor, and opt instead for one-way transmission of information, making it a one-sided communication. However, more recent theories show growing support for seeing communication as a transactional process, where meaning is co-created through interaction and mutual influence (Craig, 1999).

Dialogue and Dialogic - Dialogue is a term present in the Excellence Theory and other public relations literature. With the intent to expand this concept, Kent and Taylor underlined that true dialogue between organizations and the public cannot occur without being preceded by dialogic thinking. Dialogic thinking is stated as a more expanded philosophical perspective that guides a procedural approach to establish an open interactive communication where other people's opinions and interests are acknowledged and valued (Macnamara, J., 2016).

Relationship - This dimension of relationship building has long been considered a central focus on stakeholder relations, and a core element of Excellence theory (Grunig, 2002). Hon and Grunig (1999) highlighted that relationships are built on key elements, one of which is control mutuality, characterized as the idea that both parties in a relationship should have some influence over one another. Moreover, Broom (2009) added that these relationships should be mutually beneficial.

Engagement - Even though it is perceived as under-theorized, agreeing to Devin and Lane, engagement in public relations is still a central concept. Considering both intellectual handling (understanding information) and emotional commitment (feelings), Taylor and Kent (2014) further describe it as a two-way, relational exchange where organizations and stakeholders interact to improve mutual understanding and make decisions that benefit all involved, “not simply just the organization”.

Co-orientation - Co-orientation underlines the need for organizations to align their interests with their public while also helping the public understand the organization’s perspective. The tendency of orientation usually becomes too organization-centric (Fawkes, 2015), nevertheless, co-orientation is gaining ground on modern theories, being recognized as a key factor to flourishing two-way communication within an organization.

As a final note, organizational listening is especially important for NPOs, due to the high reliance on stakeholder trust and support for the mission. By listening to stakeholders, such as partners, the organizations not only address stakeholder concerns but also enhance its legitimacy and operational performance.

4.5 Recommendations for partner engagement

Recalling the interview insights and considering the concepts that aim to explain what factors contribute to a high-quality stakeholder relationship, it is possible to derive what are points of improvement identified for CECD.

Although CECD partners generally display strong loyalty and stability, the organization should keep aiming to build proximity with its partners, as noted in the interview findings. By using two-way communication, and engaging partners in meaningful dialogue, preceded by dialogic thinking, as proposed in the Organizational Listening framework, CECD can enhance relational quality, making partners feel more integral to its mission, progress, and social impact. Moreover, in the engagement dimension, there is ample opportunity to release new initiatives that attend partners' input, ultimately making them feel more connected to organizational outcomes and the broader community.

As previously noted, the marketing department lacks a clear strategy, which consequently may hinder their way of effectively communicating with partners. To ensure long-term partner retention, it is important for CECD to nurture these relationships, from the initial assistance request through to final recognition. In this sense, the cooperative should establish, within the marketing scope, a partnership strategy that communicates with partners at each stage of the collaboration. On a first instance, the communication should be directed to discussing what are CECD's upcoming objectives, in what way partners can contribute, and hear their opinion on that matter. Throughout the project's development, the institution could provide updates on progress. In the end of the year for example, not necessarily upon a project completion, the engagement strategy should lie on showing the impact created, assessing partners' satisfaction and formally recognize all parties involved, that could imply for example, to bring back the initially crafted approach of final monitoring. Given this, recommendations should include a targeted strategy to ensure financial sustainability from stakeholders, followed by practical initiatives.

The concept of “*empresa amiga*” (Friendly Company) assists CECD and other private institutions of social solidarity (PISS) to create a solid commitment between themselves and its partners. This initiative is applied in a PISS called “*Quinta Essência*” and consists of a contract

between the cooperative and a party that wants to contribute to its mission through funding. On the side of the institution, the goal is to guarantee support of CECD's beneficiaries, through projects to enhance infrastructures, and the development of new programs, with the intent to increase CECD's response to clients' needs and improving the quality of activities. On the side of the firm that wants to be an "empresa amiga", it is expected a periodic contribution with a minimum amount, supported by an automatized system that allocates the funding from one account to the other. This criterion should be shaped according to CECD's financial needs and expectations and can vary from a fixed amount to a percentage of the firm's profit, from a monthly to an annual contribution. In exchange, the involved firm can benefit from an enhanced corporate identity and reputation, as it receives a diploma and a seal of recognition as an "empresa amiga". Then, it benefits from fiscal advantages through donation receipts under the Fiscal Benefits Statute. On the other hand, the firm will get periodic communication and information, through an annual report and newsletters, focused on ensuring its involvement on the institution's project development and impact. Furthermore, the company is invited to events and Galas organized by CECD, experiencing more direct contact with the community. These general characteristics of the contract are inspired by "Quinta Essência", however, CECD can personalize to its unique entity. Instead of "empresa amiga" this initiative could be called "aliado social" (Social Ally) or "parceiro de impacto" (Impact Partner).

This proposal can be understood as a strategy for CECD to guarantee the regularity of partners' donations, while strengthening its relationships with them. In alignment with this, CECD should explore practical efforts to sustain and deepen partner involvement effectively.

Firstly, CECD can introduce 'Open Evening' days. Inspired by its "open days" initiative, this event adapts to partners' tight schedules, offering them the opportunity to visit the organization and potentially later participate in a Craft workshop. This invitation shows that the

institution wants to promote direct contact with these parties, an area that was previously identified as an improvement one.

As previously noted, CECD organizes galas to engage with the community including partners, but they are sporadic and lack direction. An Annual Gala is a pertinent occasion to celebrate what all the parties have achieved together and gives the community, including partners, something special to look forward to in CECD. Given this, one can propose an annual Gala, which serves as well as a fundraising moment. Counting with partners, the institution's dedicated team and the families they support, the event could be aimed to showcase the main achievements, the impact created, and future goals.

After acknowledging achievements and sharing the short-term ambitions and long-term vision with the partners in a Gala, it's equally important for the organization to establish a process for regular feedback and updates. While defining the future direction is essential, so too is maintaining transparency along the way by documenting progress and achievements. During the interviews, a suggestion arose from a partner: *"we have an annual meeting (...) if we can do something else (...) because institutions change, we change too, companies also change"* – CECD partner of five years. Furthermore, it is important to ensure web-based accountability to communicate social outcomes, as constated previously in the literature review. In other words, Internet-based technologies such as websites, and social media, serve as good tools for a non-profit organization to showcase its social impact. By consistently communicating the updates, through periodic follow-up meetings, report format, or social media, CECD not only shows appreciation for each partner's involvement but also keeps them engaged and informed about the institution.

This wave of thought is supported by a partner that lies on the engagement-oriented type, which states that *"when we receive that newsletter, even if we don't get the same attention every month (...) I think that helps to maintain a connection"* *"It helps perhaps to keep in touch,*

because there may be times when there is no contact. It helps sometimes to understand things that the organization is doing, that we don't know because we are not seeing it every day” – CECD partner of five years. The newsletter serves as a good tool to give continuity to the final monitoring meetings, and its periodicity of publishment could vary according to the flow of news.

In the visual aspect, the newsletter could adopt a storytelling approach, containing colorful visuals and photos to make it more compelling to see and read through. It might include powerful "before and after" images of projects completed with partner support, as well as highlights of recent workshops, visits, and events, recognizing the partners who have played a vital role in these successes. To complement, sharing personal stories of individuals who have achieved a remarkable progress through CECD's programs, and comments from families would add an emotional, personal element. Additionally, the newsletter could celebrate significant milestones and awards, such as winning the Christmas Contest for two consecutive years, with highlights of the 2024 edition to showcase the creativity and effort behind these initiatives. To make it more interactive and engaging, it could cover sections of games, quizzes and do-it-yourself tutorials. Lastly, it can present discussions on social themes, for instance, behavioral studies examining how individuals with IDD perceive a transition into the workforce, and after, showcase the products CECD has for sale. As a final note, sending this news to partners, or posting it on the website and notifying these parties, shows that CECD is eager to make everyone feel part of the institution's ongoing impact and growth.

4.6 Alignment with CECD 2025 objective: “Managing partnerships strategically”

CECD supports the observation that a targeted strategy towards partners is needed. According to the Activity & Budget Plan 2025, within the scope of community objectives, stated as objective I.1, CECD has outlined the need to implement measures to centralize and expand its network of strategic partnerships. To achieve this, CECD plans to implement a CRM

(Customer Relationship Management) tool by the end of the year's first half, in order to streamline the organization and management of partnerships. In parallel, CECD aims to expand and publicize its strategic partnerships. In this sense, the institution's efforts are centered on identifying and strengthening both current and potential collaborations to support new areas of social services, while improving communication and ensuring the long-term sustainability of the organization (CECD Activity and Budget Plan 2025, 2024, p. 8).

The overall strategy suggested in the work project aligns with CECD's goal of efficient engagement with partners. Specifically, the "empresa amiga" strategy could be incorporated in the CRM tool, as it settles a contract between CECD and key partners. This initiative guarantees an inflow of funding from partners, in exchange for consistent and tailored communication with partners, granting CECD more efficient management of its partnerships.

4.7 Main Conclusions and Limitations of CECD's Partners Strategy

This chapter tackled Objective #3, *assess CECD's current partner engagement practices*. Initially, CECD's current efforts to sustain partnerships were examined, revealing a strategic deficit in partner management. To enrich the analysis, interviews were conducted with a loyal base of partners, focusing on what they value in partnerships and their perceptions of engagement with CECD, particularly in terms of communication. Additionally, through a search of literature reviews that conceptualize quality relationship management in the context of non-profit organizations, it was possible to assess and audit CECD's situation under frameworks, identifying areas for improvement. By combining this data collection, the analysis informed the development of a tailored strategy for CECD, answering to the initially defined project objective.

The previously discussed recommendations, when grouped into a linear and concise strategy, serve as a solid plan for CECD to follow, nonetheless one can recognize that there are limitations associated. The suggested initiatives' implementation is constrained to several

factors, including the current CECD's marketing team dimension, which contains two people, as confirmed in a meeting with CECD, which took place on November 2024. This aspect compromises CECD's ability to handle all initiatives effectively and consistently, as they are time-intensive and work-intensive. Given this, in order to perform the recommended partner engagement strategy, CECD requires a marketing team expansion. Budget-wise, this presents a challenge to CECD, alongside the financial demands of organizing Galas. Furthermore, the strategy is targeted primarily to partners, making their adherence and positive feedback critical to its success. However, as covered before, partners' time is limited, which affects their ability to actively engage in the cooperative's projects. In methodology terms, the data collection encounters limitations. Since the pool of partners interviewed was small, generalizing the findings is challenging, as statistical theories state, there is a higher risk in assuming results from small samples, due to the higher likelihood of bias and lack of representativeness. Given this, the theoretical saturation requirement established in Section 3: study's methodology was thus not satisfied.

As mentioned before, these practical initiatives should belong to a structured communication strategy, targeted to partners. CECD already has strong relationships with some partners, therefore the usual online meetings with them are a comfortable environment to share thoughts. In this sense, further recommendations could be picked from these usual meetings. Moreover, the initiatives can be shaped according to CECD's preferences and the partners' openness to adhere and time availability. However, it is important to have consistency, and be strategic based, while aiming for more direct contact in partnerships.

5. Summary of Project Recommendations (Group Part)

The final recommendations provided in this project emerged in response to the organizational challenge identified after a preliminary analysis of CECD situation that was translated into the following study's objective: **Investigating actionable approaches for**

CECD to strengthen its key stakeholder relationships through strategic communication efforts, while optimizing the portfolio of its Protected Employment Center to improve financial sustainability.

Thus, to better tackle the overall problem identified, two pillars of strategic action became the focus of the study. One focused on “**optimizing the portfolio of its Protected Employment Center to improve financial sustainability**”, and the other centered on “**strengthening its stakeholder relationships through strategic communication efforts**”.

The first pillar is associated with objective #1 *Assess the performance potential of the Protected Employment Center’s ‘Plant Nursery’ and ‘Laundry’ within CECD’s service portfolio*. Recommendations intended to optimize the Protected Employment Center were developed. In summary, The Laundry Unit is advised to implement a client segmentation system, in order to help the institution optimize its scarce resources, such as workload and machine usage. Additionally, CECD could focus on reaching out to new Business to Business segments, namely gyms, spas, and hotels. As for the Ornamental Plant Nursery Unit, recommendations are made to develop a Unique Value Proposition in order to encourage repeat business and attract new clients. Further recommendations to modernize the Plant Nursery Unit, include marketing strategies that take into consideration market trends and use social media platforms and loyalty programs to ultimately achieve positive financial growth. Furthermore, the implementation of an e-commerce platform that would work as a pick-up model could guarantee operational and financial flexibility.

The second pillar of recommendations is associated with Objectives #2 to #5. Regarding objective #2 CECD will be able to strengthen its relationship with stakeholders by communicating accurately their brand identity and improving their brand perception. To that end, it is recommended to modify the current slogan to a version that captures the organization’s mission and vision and overall brand essence: “*CECD: Educação e Inclusão para Transformar*”

Vidas.” This slogan should be launched in the public event that will commemorate CECD's fifth anniversary. This event is also an opportunity to celebrate the positive impact of CECD’s in society and highlight CECD’s identity by applying the six dimensions of the Brand Identity Prism framework.

Next, objective #3 is to strengthen key stakeholder relationships. It is recommended investing in relationship with partners, through strategic communication efforts consisting of an implementation of “empresa amiga”, a newsletter, and of “open evenings” by inviting partners to gather at CECD venue. These recommendations address current gaps identified in CECD’s partners relationship and aim to help CECD improve its overall strategic approach when handling its partnerships, focusing on creating systems of updates and enforcing direct contact with partners.

Consequently, regarding Objective #4, the recommendations proposed are defining clear objectives for a stakeholder-oriented communication ensuring a meaningful approach in order to build trust and better present CECD’s value proposition, while increasing the organizations visibility, digital presence and organic reach, with the implementation of a SEO strategy and other initiatives. Aligned with the previous recommendations, the creation of a seamless experience between CECD’s value proposition and its communication through digital and in-person channels, allows for a personalized approach to stakeholders, building more meaningful connections and, therefore, strengthening their relationship.

Finally, objective #5 the planning of the CECD’s 50 Years Anniversary Gala is a key marketing opportunity at the internal level, to, celebrate CECD 50 year legacy, strengthen the organization’s commitment to its mission and values, and at the external level, to foster relationships with stakeholders, , and to develop a fundraising strategy that can result in a medium to long-term improved financial sustainability.

Specifically, it is recommended that during the gala an impact presentation is developed, followed by testimonies where beneficiaries can highlight how CECD has positively impacted their lives. Then a video for an emotional response, showcasing the CECD 50 years journey. A live auction could be organized serving as a fundraising strategy, and a live entertainment with fado artists could engage the audience. Has a surprising element, the CECD choir could perform creating a lively and engaging atmosphere. Overall, this future gala could be an opportunity to merge all dimensions.

The recommendations delivered are aligned with CECD's goals for 2025. By looking at the 2025 Activity Plan & Budget, there is an alignment between this project and CECD's argument on the importance of acting in two dimensions: community and innovation.

Regarding community, a partnership management strategy is needed to retain and amplify the partner base, and social initiatives including the expansion of speech therapy services and the diversification of revenue streams through nursery and laundry services, are crucial for reinforcing CECD's financial sustainability.

Regarding innovation it is essential to innovate on the delivery of CECD's identity and communicate it through different channels. Given this, a study of brand perception and brand analysis was developed to improve the communication of CECD's brand identity, and a digital marketing strategy to improve institutional visibility.

The recommendations for each objective, and their connection to the 2025 Activity Plan & Budget are presented in *Table 15: Summary of Recommendations that answer to the Project's Objectives*. Additionally, the 50 Years Anniversary Gala is expected to cost approximately 23 429 euros, and it is expected to generate a revenue of approximately 24 818 euros. Thus, resulting on a projected profit of 1 389 euros.

Table 15: Summary of Recommendations that answer to the Project's Objective

Objectives formulated by authors of the thesis	Objectives formulated by CECD	Recommendations
O1: CECD's Strategic Business Profitability	Aligns with Objective I.2: Consolidating the Hybridization	<ul style="list-style-type: none"> - Reduce cost for both Laundry and Nursery - Improve operational efficiency in the areas of concern: Laundry and Nursery - Enhance revenue stream for future CEP's financial sustainability
O2: CECD's Branding Strategy	Aligns with Objective II.4 Improving the organization's strategy, processes and procedures and Objective II.6: Implementing a marketing and fundraising strategy	<ul style="list-style-type: none"> - CECD's proposed new logo: CECD: educação e inclusão para transformar vidas - CECD's 50 years Integrated Marketing Campaign
O3: CECD's Partners Strategy	Aligns with Objective I.1: Managing partnerships Strategically	<ul style="list-style-type: none"> - Implementation of "empresa amiga" strategy - Newsletter - "Open Evenings" focused on receiving partners in CECD buildings
O4: CECD's Digital Marketing Strategy	Aligns with Objective II.4: Improve the strategy, processes, and organization procedures, more specifically Integrated Marketing & Communication Strategy	<ul style="list-style-type: none"> - Define clear objectives for Stakeholders-focused communication - Implement SEO to enhance online visibility and organic reach - Integrate digital campaigns with in-person events for cohesive engagement
O5: CECD's Next Step: 50 Years Gala	Aligns with all Objectives above	<ul style="list-style-type: none"> - Impact Presentation - Testimonials - CECD 50 years video presentation - Auction - Live entertainment - Surprise element: CECD choir performance

Source: own elaboration, CECD objectives from CECD Activity Plan & Budget 2025, p. 8, p.9

6. Final Conclusion and Limitations (Group Part)

CECD has a long record of implementing successfully its strong social mission, of promoting inclusion and supporting individuals with intellectual and development disabilities. Nevertheless, it faces significant challenges in effectively communicating its value proposition and guaranteeing long term financial sustainability.

CECD is facing challenges in communicating its value proposition to internal and external stakeholders. The identified project overall objective is **investigating actionable approaches**

for CECD to strengthen its stakeholder relationships through strategic communication efforts, while optimizing the portfolio of its Protected Employment Center to improve financial sustainability. The organizational challenges can be answered by two dimensions: one focused on optimizing Protected Employment Center and the second focused on designing strategic communication efforts (please see above, Section 5: Summary of project recommendations). Furthermore, the project's objectives, provide a perspective on how the challenge can be faced (*please see, Table 1: Project's Objectives*). In sum, objective #1 answers by working on the optimization and financial contribution of the Protected Employment Center, and the remaining Objectives intend to provide solutions to the strategic communication dimension.

The study consisted of a complete and rigorous data collection involving primary and secondary data to analyze CECD situation as a basis for a useful project. This approach grants a more robust data analysis by using the pre-defined knowledge from past research (literature review of core concepts) with primary data (10 semi structured interviews).

Regarding the primary data, a total of ten semi-structured interviews with different CECD's stakeholders were performed by following an interview guide tailored to each interview type (*please see Appendix 12: Interview Guide – CECD employee, Appendix 13: Interview Guide – Partners, Appendix 14: Interview Guide – CECD marketing employee & Appendix 15: Interview Guide – NGOs marketing specialist*), which allowed the collection of valuable insights by knowledgeable respondents. As this project is based on qualitative insights, theoretical saturation was used to determine the sample size, therefore, interviews were scheduled until no new insights or data emerged.

Additionally, secondary data was retrieved from official CECD reports available to the public and with the organization's provision of internal reports on stakeholder identification and

partner management, coupled with a comprehensive contact list, that allowed to perform a consistent analysis.

The answer to the organizational challenges identified consists of a set of recommendations, targeted to two intervention pillars: Protected Employment Center and strategic communication efforts. An in-depth description of the recommendations, and how they improve CECD's operations within the problem identified can be found in Section 5: Summary of Project Recommendations. The suggestions proposed not only address the project problem but are also closely aligned with CECD's 2025 Activity Plan & Budget, emphasizing the importance of acting in the dimensions of community and innovation.

In summary, CECD should consider actionable strategic approaches to improve its stakeholder relationships and communication, mainly the area of brand identity, partner engagement, digital marketing, and to improve financial sustainability, namely the management of the portfolio of its Protected Employment Center. In addition, the imminent Gala to celebrate the 50 years of the organization can be organized to merge the above-mentioned dimensions initiatives.

This project's limitations are associated with the methodological approach, the frameworks used to collect and analyze data, scarcity of resources by the team, and implementation constraints. Regarding data collection, the interviews are subjected to biases which can be related to social desirability, or the interviewees feeling pressured by the nature of the interview questions or the presence of the interviewer to give a certain answer, which may misrepresent the reality and lead to less accurate insights collected. Nevertheless, as the fundamental data was related with understanding the organizational challenge, collecting qualitatively the perspective of the organization in their unique point of view was key, and as data about the relationship with key stakeholders was also critical, hearing their perspective about CECD's current and desirable actions was pivotal.

Another limitation is the sample size. The small pool of participants, ten out of the thirteen stakeholders list provided by CECD participated, might not gather all existing perspectives. In other words, theoretical saturation for most of the interview protocol questions has not been reached. Still, in qualitative research we are not looking for generalizations but for deep insights about the specific unique context of the phenomena under study. Another potential limitation is the fact that the frameworks chosen from the literature to be applied, such as the CBBE framework, may have inconsistencies. Time constraints restricted the ability of the group to perform more data collection, such as a survey questionnaire, to eventually triangulate findings with interview data, and to generate more effective and targeted recommendations.

A final word for the actionability of our recommendations. Considering resources, CECD may experience challenges in the implementation of the strategies recommended. Due to the small dimension of CECD's marketing team, consisting of two people, CECD's ability to execute strategies comprehensively and consistently is restricted. Moreover, budget limitations may hinder the implementation of resource-intensive initiatives, including the Gala, and the potential low attendance and adherence of key stakeholders to these proposals can disrupt their execution.

Nevertheless, the project was shaped to CECD's necessities and elaborated in order to bring to assist the institution with recommendations that we hope are valuable in enhancing its relationship with stakeholders and achieving long-term financial sustainability.

As a final note, the authors of the thesis believe that CECD has a notable merit and many strengths, and that by crafting clear targeted strategies to pre-identified target audiences, it is possible to fill the existing gaps CECD faces in communication and engagement and strengthening the commercialization of key portfolio services to implement its social mission and enhanced societal contribution while ensuring its financial sustainability.

Thank you note for CECD

We would like to sincerely thank CECD for the help during the development of this Work Project. Since the very beginning, they showed their clear and strong support to the team by providing valuable information, availability to participate in the interviews and continuous communication to clarify doubts and information. Without a doubt, their contribution has significantly impacted the outcome of this Work Project.

7. Appendixes

Appendix 1: CECD'S Organizational Values

Value	Description
Respect	From everyone to everyone, to protect and accept other's identity, autonomy, values, choices and personal spaced regardless of differences.
Valuing Difference	Respect other dissimilarities or disparities.
Evidence of Capacity	Recognize and promote individuals based on their positive attributes and capabilities.
Confidentiality	The obligation of not sharing sensitive and private information regarding beneficiaries.
Active Participation	The action of making sure that all beneficiaries participate in the decision-making process regarding choices that affect their life.
Cooperation	All activities developed in the organization demonstrate the organization core's values of solidarity and mutual help.
Team Spirit	Feeling of belonging to a working community based on the values of trust, respect, communication and focus on common goals.
Loyalty	Being sincere and honest toward every member of CECD.

Professionalism	Delivering high quality results in all assign responsibilities and duties while showing extraordinary human and pedagogical skills.
Impartiality	Acting with integrity and prioritizing the interest of CECD and its beneficiaries during all contact with a third party.
Rational use of resources	Characterize by the efficient use of all resources and corroborate that they are not being use for personal purpose.
Optimism	Promoting a positive attitude and culture of resilience, focusing more on finding a solution than on the problem.
Social and Environmental Responsibilities	Incorporating social and environmental responsibilities into the relationship with stakeholders and CECD's daily operation, promoting a more sustainable future.

Source: CECD Annual Report 2023

Appendix 2: CECD 10 quality principals based on EQUASS

Quality Principles	Description
Leadership	Promoting positive change through good governance by enhancing the organization reputation and maximizing resources.
Human Resources	Commitment to hiring well prepared and qualify personal to ensure a customer-centric service. Promote a culture of employment well-being and continues learning.

Rights	Dedicated to protecting clients right, ensuring equal opportunity for all beneficiaries, freedom of choice, determination and fair participation.
Ethics	Prioritizing client well-being, promote social justice and mitigating risk.
Partnership	Achieve a more inclusive society and high impact services through finding and developing internal and external synergies.
Participation	Increase participation and inclusion, inside and outside CECD, for all beneficiaries and members of the organization.
Customer Orientation	Dedicated to implementing work processes that enhance service of quality, prioritizing the needs of current and potential customers.
Scope	Certified that all beneficiaries and clients have access to all solutions and services developed by CECD.
Guidance for Results	Resources, both material and humanitarian, focused on working under a results-orientated framework to achieve perceivable and measurable results.
Continues improvement	Striving to work and perform under the mindset of generating the most productive and favorable outcomes for CECD's internal and external stakeholders by allocating resources, improving quality developing effective marketing and communication strategies.

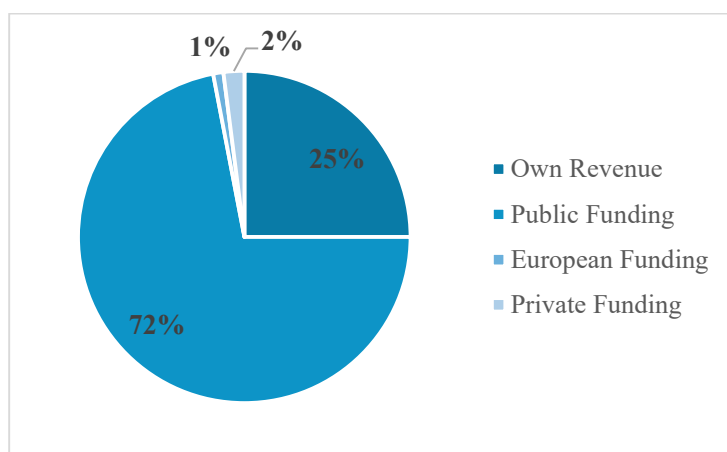
Source: CECD Annual Report 2023

Appendix 3: Four Pillars of Financial Sustainability

Pillar	Explanation
Financial and Strategic Planning	Strategic planning highlights an organization’s mission and objectives, while prioritizing actions to achieve them. A Financial plan outlines the organization projected expenditures and the organization ability to generate income to cover these expenditures.
Income Diversification	Both the number of internal income-generating activities and the diversity of funding sources are important. At least 60% of the organization’s total budget must come from five different sources.
Sound Administration and Finance	Involve managing resources efficiently and transparently, following institutional policies that foster sustainability, ensure accurate documentation, and allow for informed decision-making. Two examples of financial statement are Balance Sheet and Income Statement.
Own Income Generation	Includes strategies such as establishing endowment funds or fundraising for operational growth in order to generate revenue that the organization can allocate as needed.

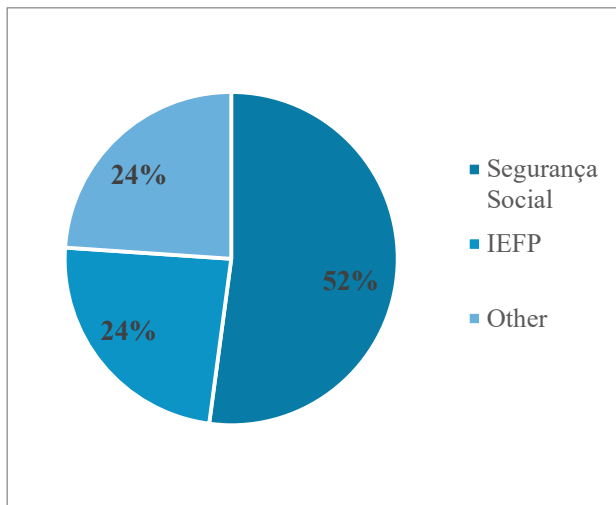
Source: own elaboration

Appendix 4: Graph 1: CECD’s Funding Composition 2019



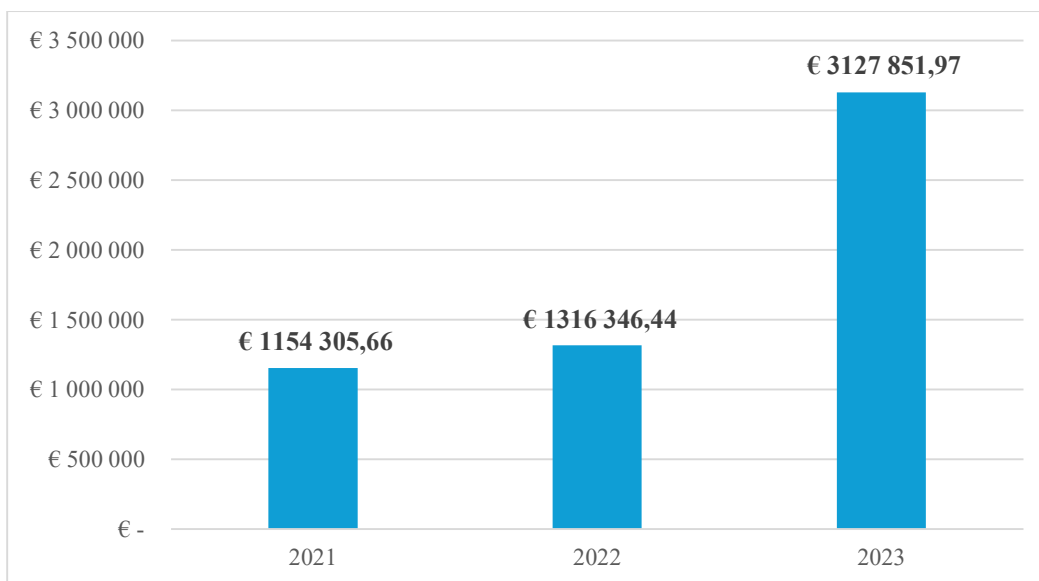
Source: own elaboration

Appendix 5: Graph 2: CECD's Public Funding Composition 2019



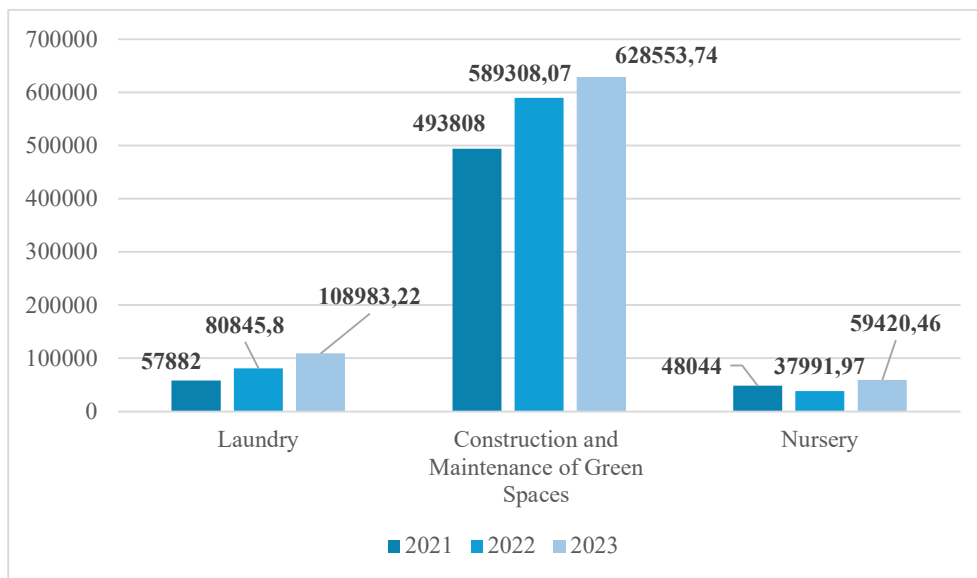
Source: own elaboration

Appendix 6: Graph 3: Income Statement – Sales and Services



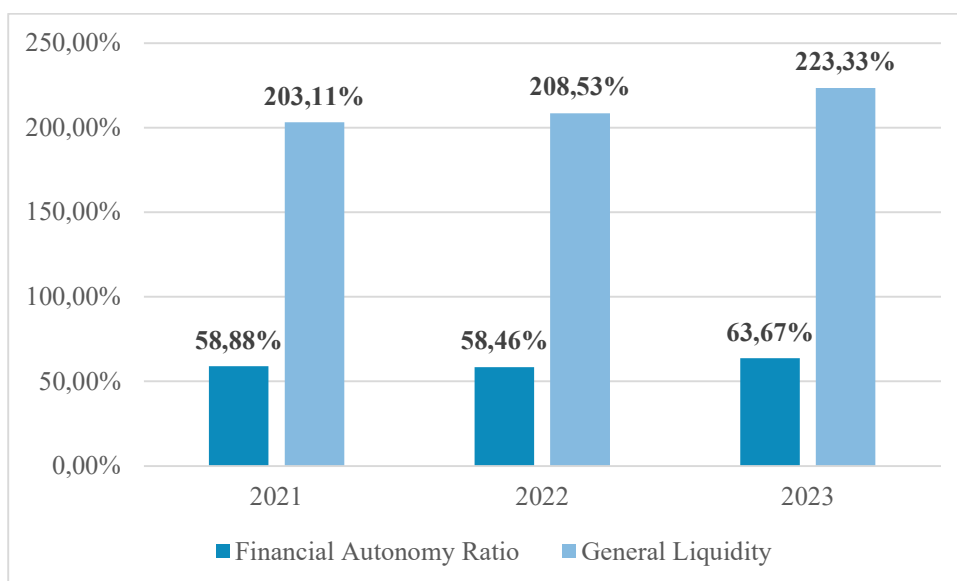
Source: own elaboration

Appendix 7: Graph 4: CEP Sales and Services Volume



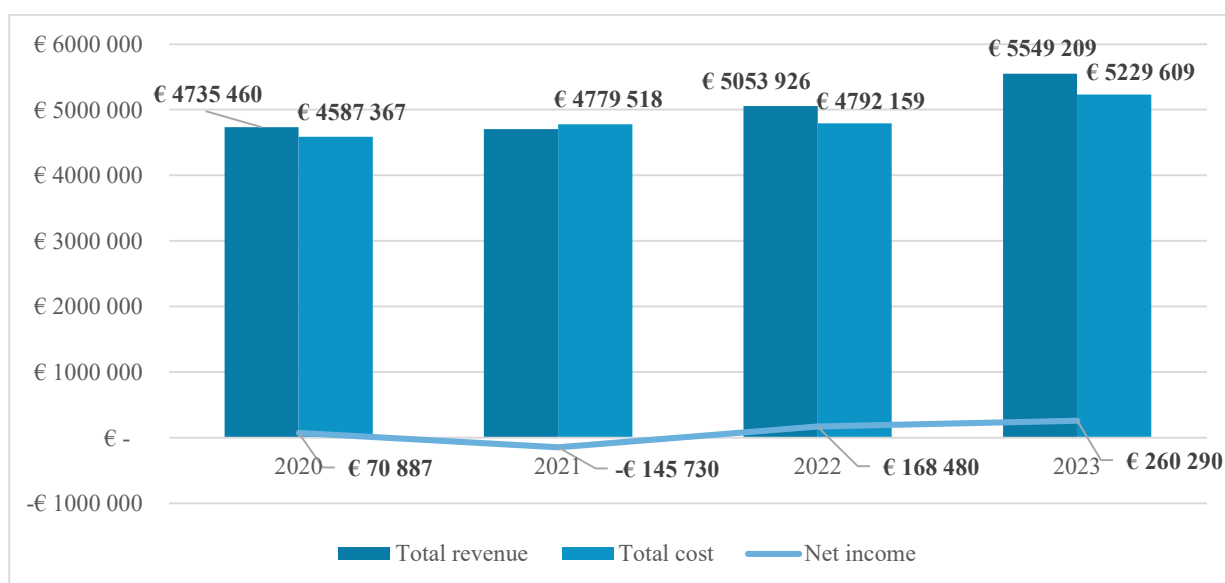
Source: own elaboration

Appendix 8: Graph 5: CECD's Financial Autonomy



Source: own elaboration

Appendix 9: Graph 6: CECD's Revenues and Costs (2020-2023)



Source: own elaboration

Appendix 10: Graph 7 supporting data and calculations.

Table 16: Table used to compute graph 6

	2020	2021	2022	2023
Total revenue	4 735 460	4 703 590	5 053 926	5 549 209
Total cost	4 587 367	4 779 518	4 792 159	5 229 609
Net income	70 887	- 145 730	168 480	260 290

Source: own elaboration

Table 17: Total Revenue calculations for graph 6

	2020	2021	2022	2023
Sales and Services	1 182 240	1 154 306	1 316 346	3 127 852
Operating Subsidies	3 427 748	3 426 471	3 616 176	2 262 188
Work Performed by Own Entity	6 790	8 709	7 937	4 061
Fair Value Adjustments (Increase)	2 196	-	-	-
Other Income	116 485	114 104	113 467	155 108
Total Revenue	4 735 460	4 703 590	5 053 926	5 549 209

Source: own elaboration

Table 18: Total Cost calculations for graph 6

	2020	2021	2022	2023
Cost of Goods Sold / Consumption of Materials	57 851	66 620	79 341	82 967
Supplies and External Services	909 546	921 285	938 727	1 065 268
Personnel Expenses	3 441 458	3 627 253	3 614 781	3 855 337
Impairment of Receivables (Losses)	3 515	13 521	4 631	517
Fair Value Adjustments (Decrease)		2 538	1 055	-
Other Expenses	174 996	148 301	153 624	225 521
Total Cost	4 587 367	4 779 518	4 792 159	5 229 609

Source: own elaboration

For the difference in percentage calculations, the formulas used were:

$$\text{Percentage Calculation for Revenues} = 100 - \frac{\text{Rev } (n - 1) * 100}{\text{Rev } n}$$

$$\text{Percentage Calculation for Costs} = 100 - \frac{\text{Cost } (n - 1) * 100}{\text{Cost } n}$$

Appendix 11: Comparative Insights from CECD Marketing Employee and NGOs Marketing Specialist Interview Questions, Main areas of Consensus and Main areas of Divergences

<i>Interview Questions</i>	<i>Main areas of Consensus</i>	<i>Main areas of Divergence</i>
<i>CECD Marketing Employee: "What channels or tools do you use to communicate with your target audiences? Do you consider they have been effective?"</i>	<i>Digital platforms, such as Facebook, Instagram, and LinkedIn, are crucial for engaging stakeholders, especially corporate donors.</i>	<i>The CECD employee highlights limitations in the use of digital platforms while the specialist emphasizes the potential of targeted strategies and campaigns for improvement.</i>

<p>NGOs Marketing Specialist:</p> <p><i>"In your experience, what are the most effective communication channels for building connections with the different stakeholders of an NGO?"</i></p>		
<p>CECD Marketing Employee:</p> <p><i>"What was the main motivation for the creation of the marketing department? And what are the main challenges you face on a daily basis?"</i></p> <p>NGOs Marketing Specialist:</p> <p><i>"How have you observed the evolution of marketing applied to NGOs in recent years?"</i></p>	<p><i>The increasing importance of marketing actions on NGOs is recognized shifting from being seen as a luxury to becoming an essential component for achieving organizational goals.</i></p>	<p><i>The CECD employee focuses on internal challenges while the specialist notes more external factors (more focused on NGOs market)</i></p>
<p>CECD Marketing Employee:</p> <p><i>"Can you identify an NGO that you consider to have good marketing practices? What elements of those practices do</i></p>	<p><i>Both highlight Associação Salvador as an example of successful marketing due to its storytelling, strong</i></p>	<p><i>The CECD employee focuses on practices like storytelling for the organization, while the specialist focuses on the use of digital tools like SEO</i></p>

<p><i>you think would be useful for CECD?"</i></p> <p>NGOs Marketing Specialist:</p> <p><i>"Can you mention an NGO that you consider to be a good example of digital marketing strategies, the first one that comes to mind? What are the main factors that distinguish it?"_</i></p>	<p><i>ambassador presence, and effective communication.</i></p>	<p><i>and impact reports for differentiation.</i></p>
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Source: own elaboration

Appendix 12: Interview Guide – CECD employees

Introduction

Hello, it's a pleasure to be here. We are a group of students from the master's in management at Nova School of Business and Economics, conducting research to help enhance CECD's marketing and communication strategy. The goal of our conversation today is to gain insights into CECD's identity and understand the key marketing and communication challenges it currently faces, from the perspective of people with responsibilities within CECD. Your feedback will be invaluable in shaping a strategy that aligns with CECD's mission and goals. This interview will be divided into two parts, with a total duration of about 45 minutes. There are no right or wrong answers, so please feel free to share your personal perspective.

Before we begin, we would like to clarify if you can answer these topics. You can just answer yes or no. Marketing and communication challenges; Stakeholder prioritization; Financial sustainability and social business contribution; CECD's current donors. We will keep this in mind and adapt the interview accordingly. If you cannot answer any questions, just let us know, and we will move on.

Rest assured; all information shared in this interview will remain confidential. Additionally, the recording will be deleted as soon as the data is analyzed. For quality purposes, would it be okay with you if we record this interview?

Thank you for your time and participation!

Ice breaking Q: We would like to start by asking you about why and when you joined CECD?

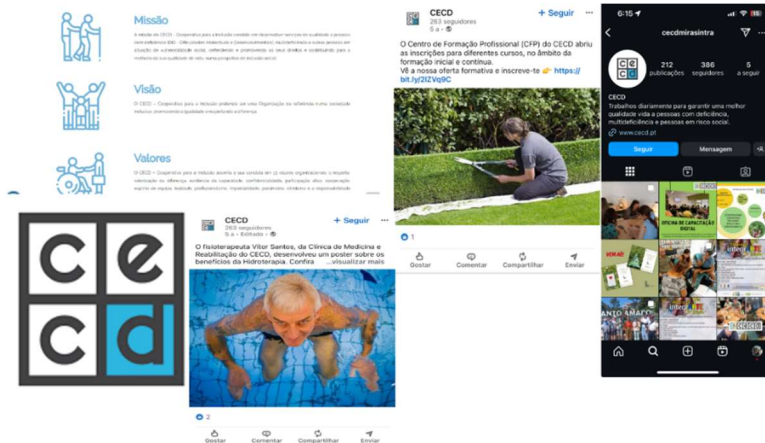
FIRST PART:

Section 1: Understanding CECD'S Organizational Identity (5 min max)

- How would you describe CECD's core mission and values?
 - (Follow-up Q: How do these values guide CECD's day-to-day activities?)
- In your opinion, what makes CECD **unique** compared to other organizations working in the social inclusion sector?
 - (Follow-up Q: Can you provide examples of how this uniqueness is communicated or demonstrated to stakeholders?)
- How well do you think the organization's **Internal team understands and aligns** with CECD's mission and values?
 - (Follow-up: Are there any areas where internal alignment could be improved?)
- Do you think external stakeholders, such as beneficiaries, donors, and partners, have the same degree of understanding of CECD's identity and role in the community?
- Organizational Identity and Brand Perception: Imagine you are going to explain to someone that has no knowledge what is CECD and its mission, what would you say?

Section 2 – Intended CECD’s Brand Meaning

- Considering the elements of CECD’s visual and verbal brand identity (e.g., logo, messaging, tone) Do you believe these elements effectively communicate CECD’s mission and values?



- Can you list the most important 2 positive and the most important 2 negative aspects of CECD? (brand strengths and weaknesses) *(give time to think before answering)*
- Imagine you are CECD, how would you describe yourself? (brand perception)
- What photo do you think it best describe CECD – please chose only 1? (brand personality). Can you explain us why did you choose that picture?



Section 3 – Challenges in Marketing and Marketing communication

- What do you consider to be the main challenges CECD faces in marketing its services and social mission?

- Follow up: are these challenges more related to resources, strategy or external factors?
- What marketing initiatives or campaigns have worked well for CECD in the past? What has not worked and why? How does CECD measures the success of its marketings and communication efforts?
- Are there any events CECD is currently organizing? That spark stakeholders' interest?

Section 4– Stakeholder Prioritization

- **Key Stakeholders**

In the following questions, we aim to prioritize stakeholders according to their influence on the organization and their potential to financially sustain and foster the business.

Stakeholder’s list:	Best 3 stakeholders according to:
Funding Entities Partners Co-operating partners Employees Indirect Beneficiary: Families and Significant Others Direct Beneficiary: People with IDD Clients	<p>power (ability of a stakeholder to influence the organization, and its decisions)</p> <p>legitimacy (how necessary is the stakeholder involvement – needs deserve attention to ensure the business runs smoothly)</p> <p>urgency (attention required: deadline for compliances, the ones we should keep better updated, if applied).</p> <p>Value creation (in the present and the future). What stakeholders you believe have the highest potential to enable growth (financial and impact) in CECD?</p>

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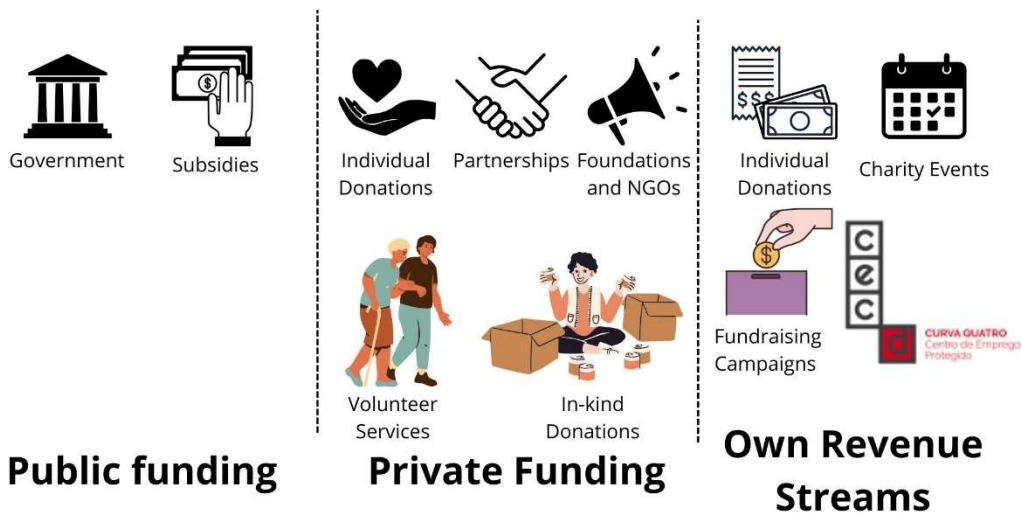
- We propose the following ranking for the final decision. **Would you change the order or leave it the same way?**

1. **Funding Entities**

2. **Partners**

SECTION 5 - Financial Sustainability and Social Business Contribution

- Can you provide an estimate of the percentage of CECD’s total revenue that comes from different funding sources, such as state funding, social businesses and donations?



- Do you think CECD is maximizing the potential of its social business to generate revenue? Why or why not?
- What do you believe are the key opportunities and challenges of expanding CECD’s social business activities to support its financial sustainability?

Section 6– Understanding CECD’s current donor landscape

- Who are CECD’s key donor demographics? (e.g., individuals, corporations, foundations)?

- Can you describe the average characteristics of your key donor groups? (take note of the key donor groups and ask characteristics)
- What do you think motivated your donors to support CECD?
 - Follow up: Have you gathered feedback from donors about why they choose to contribute to your cause?
- What is your current donor retention rate (approx.)? How do you remain relationships with long-term donors?
 - Follow-up: Are there any specific challenges in keeping donors engaged over time?
- How important is **transparency** in maintaining donor trust (e.g., financial reporting, impact measurement)?
- What types of donor campaigns have you run in the past (e.g., online crowdfunding, events, direct email)?
 - Follow-up: Which campaigns have been the most successful, and why?
- What percentage of total CECD's revenue comes from donations overall?

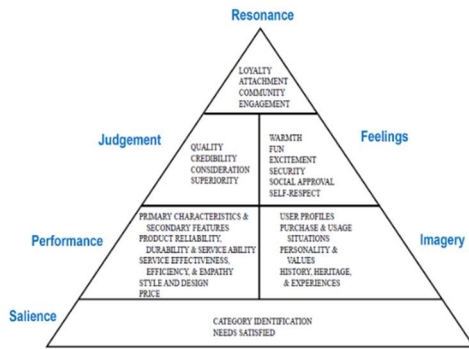
SECOND PART: CBBE FRAMEWORK

Now we have reached the second part of the interview, this will not take more than 10 minutes.

The objective of these questions is to analyze CECD as a brand and identify weaknesses and strengths. Again, here is no right or wrong questions, please feel free to share your opinion.

This part is still confidential.

The Keller model: Building blocks sub-dimensions



Salience:

1. When looking for a non-profit organization, in the Portuguese area, that focus on provide help to people with disabilities who do you think of?
 - a. *If CECD is mentioned:* how do you think they differ from other non-profit organizations?
 - b. *If not mentioned:* would you consider CECD?
2. Can you recall any recent advertisement (radio, TV, online, etc.) from CECD?
3. When considering donating, what other organizations you think about supporting alongside CECD?

Imagery:

1. When I mention the brand “CECD” what are 3 words that come to your mind?
2. When you think of CECD, which of the following words best describes CECD?
 - a. Innovative
 - b. Community focused
 - c. Collaborative
 - d. Sustainable
3. Do you think people admire and respect CECD?

Performance:

1. Do you feel CECD is reliable?

2. What makes CECD stand out?
3. What could CECD do to help make your experience as a donor easier OR more fulfilling?

Feelings:

1. Are there any particular emotions you associate with CECD? E.g., trust, admiration, etc.
2. Does CECD generate a positive feeling about yourself? Can you explain more.
3. Would you rate your emotional connection to CECD as positive or negative?

Judgment:

1. When you have a shortlist of organizations or initiatives to donate to, how do you compare the benefits and potential impact of supporting CECD versus other options?
2. What specific factors (e.g., mission alignment, transparency, impact reporting, or administrative costs) influence MORE your decision to choose one organization over another?

Resonance:

1. Loyalty: would you recommend CECD to a person who has a family member with a disability?
2. Attachment: How would you feel if CECD could no longer exist?
3. Community: do you feel a sense of community or belonging with CECD? Do you identify with the other members of CECD?
4. Engagement: how likely are you to engage in positive word-of-mouth for CECD?

Section 7 – suggestions for the future

- What opportunities do you see for CECD's in the next 1-3 years?

Closing the interview

Thank you.

Your input is critical to inform the development of a more effective marketing strategy for CECD. Is there anything else you would like to add that we haven't covered?

Next steps:

We'll be analyzing the feedback collected from all interviews and integrate them in our project.

In case we have doubts or need any further information, could we contact you for a brief follow-up?

Thank you again for you time and contributions.

Source: own elaboration

Appendix 13: Interview Guide – Partners

Introduction

Hello, it's a pleasure to be here. We are a group of students from the master's in management at Nova School of Business and Economics, conducting research to help enhance CECD's marketing and communication strategy. The goal of our conversation today is to gain insights into CECD's identity and understand the key marketing and communication challenges it currently faces, from the perspective of people with responsibilities within CECD. Your feedback will be valuable in shaping a strategy that aligns with CECD's mission and goals.

This interview will be divided into two parts, with a total duration of about 45 minutes. There are no right or wrong answers, so please feel free to share your personal perspective.

Rest assured; all information shared in this interview will remain confidential. Additionally, the recording will be deleted as soon as the data is analyzed. For quality purposes, would it be okay with you if we record this interview?

Thank you for your time and participation!

Ice breaking Q: We would like to start by asking how and when you became involved as a partner with CECD?

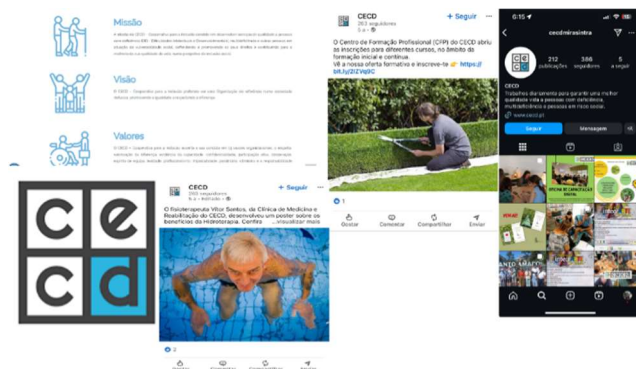
FIRST PART:

Section 1: Understanding CECD's Organizational Identity

- How did you first hear about CECD and what drew you to support the organization?
- In your own words, how would you describe CECD's mission and the work it does?
- How well do you think CECD communicates its mission and impact to partners like yourself?

Section 2 – Intended CECD's Brand Meaning

- Considering the elements of CECD's visual and verbal brand identity (e.g., logo, messaging, tone) Do you believe these elements effectively communicate CECD's mission and values?



- Can you list the most important 2 positive and the most important 2 negative aspects of CECD? (brand strengths and weaknesses)

- What photo do you think it best describe CECD – please chose only 1? (brand personality). Can you explain us why did you choose that picture?



- **Brand Consistency:** In your opinion, is CECD’s message and identity communicated consistently across all platforms (such as the website, social media, printed materials and events)?

Section 3 – Partner Engagement and Motivation

- What motivated you to support CECD initially, and what motivates you to continue supporting them?
- How often do you engage with the organization (e.g., receiving updates, attending events, reading reports)?
- In your experience, how transparent is CECD in showing where donations are used and the impact they create?
- What would you say are the most positive aspects of being a partner to CECD? Are there any areas you think could be improved?

Section 4– Partner Campaigns

- Have you participated in any partner campaigns or events organized by CECD? If so, which ones?
- How do you typically prefer to know about or be informed of CECD activity and impact? (e.g., newsletters, social media, event invitations)?

- Are there any communication methods or channels that you think CECD could use more effectively to engage with partners?

Section 5 – Effectiveness of Partner Communication

- Do you find the nonprofit’s communication (reports, emails, etc.) easy to understand, and visually attractive?
- Do you feel that the nonprofit provides you with all the relevant information you need to understand how your donation is used?
- How useful do you find the information they share about the impact of their programs?
- How timely is the information you receive about the nonprofit’s activities? Do you feel up to date with their work?
- Have you received any feedback or recognition from CECD for your contributions?
How important is partner recognition to you?

SECTION 6 – Partner Retention and Challenges

- What keeps you engaged with CECD as a long-term partner? Are there specific initiatives or messages that resonate with you?
- What costs do you perceive for supporting CECD (financial and other)?
Have you ever considered stopping your contributions to CECD? If so, what influenced that decision, and what helped retain your support?

Section 7– Future Opportunities for Engagement

- Would you be interested in participating in a future event or activity hosted by CECD? (E.g., meeting beneficiaries, networking with other partners, Educational Workshops and Seminars, Award Ceremonies, Community Engagement Days, capital campaign, volunteer events, private dinners)

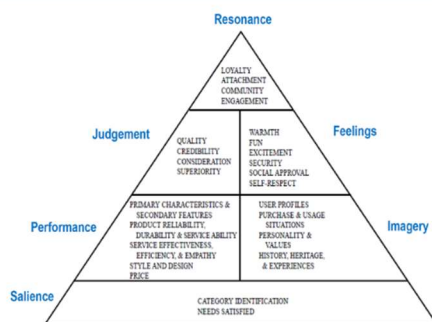
SECOND PART: CBBE FRAMEWORK

Now we have reached the second part of the interview, this will not take more than 10 minutes.

The objective of these questions is to analyze CECD as a brand and identify weaknesses and strengths. Again, here is no right or wrong questions, please feel free to share your opinion.

This part is still confidential.

The Keller model: Building blocks sub-dimensions



Salience:

1. When looking for a non-profit organization, in the Portuguese area, that focus on provide help to people with disabilities who do you think of?
 - a. *If CECD is mentioned:* how do you think they differ from other non-profit organizations?
 - b. *If not mentioned:* would you consider CECD?
2. Can you recall any recent advertisement (radio, TV, online, etc.) from CECD?
3. When considering donating, what other organizations you think about supporting alongside CECD?

Imagery:

1. When I mention the brand “CECD” what are 3 words that come to your mind?
2. When you think of CECD, which of the following words best describes CECD?
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 - d. Sustainable

3. Do you think people admire and respect CECD?

Performance:

1. Do you feel CECD is reliable?
2. What makes CECD stand out?
3. What could CECD do to help make your experience as a partner easier OR more fulfilling?

Feelings:

1. Are there any particular emotions you associate with CECD? E.g., trust, admiration, etc.
2. Does CECD generate a positive feeling about yourself? Can you explain more.
3. Would you rate your emotional connection to CECD as positive or negative?

Judgment:

1. When you have a shortlist of organizations or initiatives to donate to, how do you compare the benefits and potential impact of supporting CECD versus other options?
2. What specific factors (e.g., mission alignment, transparency, impact reporting, or administrative costs) influence MORE your decision to choose one organization over another?

Resonance:

1. Loyalty: would you recommend CECD to a person who has a family member with a disability?
2. Attachment: How would you feel if CECD could no longer exist?
3. Community: do you feel a sense of community or belonging with CECD? Do you identify with the other members of CECD?
4. Engagement: how likely are you to engage in positive word-of-mouth for CECD?

Closing the interview (5m)

Thank you.

Your input is critical to inform the development of a more effective marketing strategy for CECD. Is there anything else you would like to add that we haven't covered?

Next steps:

We'll be analyzing the feedback collected from all interviews and integrate them in our project.

In case we have doubts or need any further information, could we contact you for a brief follow-up?

Thank you again for your time and contributions.

Source: own elaboration

Appendix 14: Interview Guide – CECD marketing employee

Hello, it's a pleasure to be here. We are a group of students from the master's in management at Nova School of Business and Economics, conducting research to help enhance CECD's marketing and communication strategy. The goal of our conversation today is to gain insights into CECD's identity and understand the key marketing and communication challenges it currently faces, from the perspective of people with responsibilities within CECD. Your feedback will be valuable in shaping a strategy that aligns with CECD's mission and goals.

There are no right or wrong answers, so feel free to share your personal perspective. We would like to ensure that all shared information will be treated confidentially. The recording will be deleted after the data analysis. For quality purposes, would it be possible to record this interview? Thank you for your time and availability!

We would like to start by asking you about why and when you joined CECD?

Part 1: General Contextualization

- Can you start by telling us a bit about the marketing department at CECD? How many people make up the team and what are the main responsibilities of the department currently?
- What was the main motivation for the creation of the marketing department? And what are the main challenges you face on a daily basis?
- What do you consider to be the main marketing objectives of CECD at this moment?
- How would you describe CECD's involvement with the local community and its stakeholders? Do you feel that you are well recognized by the community?

Part 2: Segmentation, Targeting, and Positioning

- How would you describe the target audience of CECD? Who are you trying to reach with your marketing and communication initiatives?
- What criteria do you use to segment the audience you intend to reach? Are there specific groups that receive more attention?
- What channels or tools do you use to communicate with your target audiences? Do you consider they have been effective?
- Do you feel that CECD's marketing strategies have been effective in increasing brand recognition and stakeholder engagement? Where do you see room for improvement?

Part 3: Digital Presence and Website

- Does the CECD website have any main objective? Is it more focused on communicating the organization's mission, raising donations, or both?
- What is the frequency with which you update the content on the website? Who is responsible for this update?
- In your opinion, would it make sense to include a donation page on the website? Why?

- What do you consider to be the main strengths and weaknesses of the current CECD website?

Part 4: Competition and Market

- Although the NGO sector is collaborative, do you feel that you have any direct or indirect competitors in the market? Who would that be and why?
- Can you identify an NGO that you consider to have good marketing practices? What elements of those practices do you think would be useful for CECD?
- What are the main differences you see between CECD and this organization in terms of marketing and communication strategies?

Part 5: Future Strategies and Recommendations

- "If you had to identify a marketing priority for the coming years, what would it be?"
- What do you consider to be the best ways to engage the community and stakeholders of CECD, both online and offline?
- What tools or strategies do you believe could improve CECD's digital presence, considering the department's limited resources?

Conclusion

- Is there any additional aspect you consider relevant to mention about the marketing presence of CECD that we haven't addressed yet?
- What advice would you give to someone who is analyzing and proposing strategies to improve the communication and impact of CECD, as in the case of my thesis?

Closing the interview

Thank you.

Your input is critical to inform the development of a more effective marketing strategy for CECD. Is there anything else you would like to add that we haven't covered?

Next steps:

We'll be analyzing the feedback collected from all interviews and integrate them in our project.

In case we have doubts or need any further information, could we contact you for a brief follow-up?

Thank you again for your time and contributions.

Source: own elaboration

Appendix 15: Interview Guide – NGOs marketing specialist

Hello, it's a pleasure to be here. We are a group of students from the master's in management at Nova School of Business and Economics, conducting research to help enhance CECD's marketing and communication strategy. The goal of our conversation today is to gather insights on marketing in the context of NGOs and to understand the main challenges and opportunities these organizations face, from the perspective of an expert like yourself. Your feedback will be valuable in shaping a strategy that aligns with CECD's mission and goals.

There are no right or wrong answers, so feel free to share your personal perspective. We would like to ensure that all shared information will be treated confidentially. The recording will be deleted after the data analysis. For quality purposes, would it be possible to record this interview? Thank you for your time and availability!

We would like to start by asking you about why and when you joined CECD?

Initial Questions

- "Can you start by telling us a bit about your experience and involvement in NGO marketing?"

- How have you observed the evolution of marketing applied to NGOs in recent years?
- In your opinion, how can marketing be used to promote stakeholder engagement with NGO brands?

The Role of Marketing in NGOs

- In your opinion, what is the importance of marketing for the sustainability of NGOs? Can you share a concrete example of a positive impact?
- When an NGO communicates, what do you consider should be the main focus of that communication? Who should it be directed to (Beneficiaries, Donors, Partners)?
- How can NGOs create strategies that increase stakeholder engagement with their mission and brand?
- How can NGOs measure the return on investment in marketing, considering their limited resources?
- Studies indicate that the lack of funding and staff are the biggest challenges in implementing marketing strategies in NGOs. Do you agree? How would you overcome these challenges?

Strategies and Target Audiences

- What type of analysis or approaches do you recommend to understand the target audience and attract potential stakeholders?
- In your experience, what are the most effective communication channels for building connections with the different stakeholders of an NGO?

Digital Marketing: Challenges and Opportunities

- What do you consider to be the role of digital marketing in the evolution of NGO marketing?
- Do you believe that an exclusively digital approach can generate significant results for an NGO, even without support from traditional channels?

- What are the digital marketing practices you consider indispensable for NGOs nowadays?
- When analyzing the digital presence of an NGO, what should be the main focal points of analysis?

Focus on CECD and Recommendation of Best Practices

- Knowing that CECD has a small marketing team and limited resources, what digital strategies do you recommend to increase its online presence?
- What are the best ways to engage the community and local stakeholders in the CECD's mission through digital initiatives?
- Can you mention an NGO that you consider to be a good example of digital marketing strategies, the first one that comes to mind? What are the main factors that distinguish it?
- Show Website, Instagram, and Facebook "When comparing with reference organizations, what do you consider to be the main differences in how CECD and other NGOs, particularly the one you chose earlier, manage their online presence in terms of: Communication Frequency; Content Quality; Brand Engagement; Clarity of Mission and Message?"
- What good practices from this NGO and others do you think could be adapted to the reality of CECD?
- "How can CECD differentiate itself in a competitive digital market, considering its limitations?"

Metrics and Impact

- What digital performance tracking metrics do you consider most relevant for NGOs?
How can CECD monitor and adjust its digital strategy based on these indicators?

Final Reflections and Advice

- What emerging trends in digital marketing do you think NGOs should take advantage of?
- Is there any other aspect or recommendation you consider important to help NGOs like CECD strengthen their digital strategy?

- **Conclusion**

Is there any additional aspect you consider relevant to mention about the marketing presence of CECD that we haven't addressed yet?

- What advice would you give to someone who is analyzing and proposing strategies to improve the communication and impact of CECD, as in the case of my thesis?

Closing the interview

Thank you.

Your input is critical to inform the development of a more effective marketing strategy for CECD. Is there anything else you would like to add that we haven't covered?

Next steps: We'll be analyzing the feedback collected from all interviews and integrate them in our project. In case we have doubts or need any further information, could we contact you for a brief follow-up?

Thank you again for your time and contributions.

Source: own elaboration

Appendix 16: Partners' interview findings on CECD partnership management: Interview Questions, Main areas of Consensus and Main areas of Divergences

Interview Questions	Main areas of Consensus	Main areas of Divergences
Do you find current communication (reports, emails, etc.) easy to understand?	All perspectives perceive easy-to-understand communication.	Non identified.

<p>Do you feel up to date with CECD's work?</p>	<p>Both agree that communication is concise and simple.</p>	<p>In terms of the disclosure of information about impact. While one partner is satisfied with this dimension ("practical" partner), the other recommends a newsletter to receive regular updates ("engagement oriented" partner).</p>
<p>Are there any communication methods or channels that you think CECD could use more effectively to engage with partners?</p>	<p>Partners agree on direct and formal contact as a suggestion to make the experience as a partner more fulfilling.</p>	<p>Non identified.</p>

Source: own elaboration

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