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2022-05-20

Deposited version:

Accepted Version

Peer-review status of attached file:

Peer-reviewed

Citation for published item:

Raptopoulos, M. M. & Simaens, A. (2021). Enhancing social impacts of third sector organizations amid the Covid-19 pandemic. In Matos, F., Ferreiro, M. de F., Rosa, A., and Salavisa, I. (Ed.), Proceedings of the 16th European Conference on Innovation and Entrepreneurship (ECIE 2021) . (pp. 1196-1204). Virtual, Online: Academic Conferences and Publishing International Limited.

Further information on publisher's website:

10.34190/EIE.21.183

Publisher's copyright statement:

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Enhancing social impacts of Third Sector organizations amid the Covid-19 pandemic

Maria Madalena Raptopoulos, Ana Simaens

Iscte - University Institute of Lisbon, Business Research Unit (BRU), Lisbon, Portugal

Maria_Madalena_Raptopoulos@iscte-iul.pt

ana.simaens@iscte-iul.pt

Abstract: The effectiveness achieved by Third Sector Organizations (TSOs) is directly linked to goals based on their missions and results generated by their actions, which can positively or negatively impact their beneficiaries. Even in normal situations, there is already a difficulty in gathering resources to maintain their operations. The advent of the Covid-19 pandemic tends to worsen this situation depending on their social innovation and resilience capacities. From such an issue, the present study identifies strategies and lessons learned by Portuguese and Brazilian TSOs that were affected by the Covid-19 pandemic. Moreover, an assessment is made on what they did to maximize the positive social impacts and minimize the negative ones, considering the crisis management theory. Then, a qualitative phenomenological-type exploratory research was conducted, whose data was collected primarily from in-depth interviews and secondarily from documents published in the TSOs' websites. The data collected from thirty-two Portuguese and Brazilian TSOs were assessed by means of content analysis, based on existing theory and on new subjects arisen from the reported experiences. The results have shown that, regardless the institutional model, most of them were not prepared to deal with that crisis. Besides, they had been reacting as the effects were underway, seeking to maximize the positive social impacts and to minimize the negative ones. Additionally, it is highlighted the importance of a flexible management to adapting to a new challenge in order to achieve different priority goals and to meet the main beneficiaries' needs during the pandemic. Although in an early-stage research, interesting results have already been found, which can lead to contributions to management, governance, leadership, strategy, social innovation, sustainability and, ultimately, to the design of a crisis management model for TSOs. This research also calls for complementary future works.

Keywords: Third Sector; social impact; social innovation; crisis management; Covid-19; governance.

1. Introduction:

According to Fernandes (1994), the Third Sector refers to a set of organizations and private initiatives that aim at the production of goods and services of public interest. Following this roadmap, the effectiveness achieved by TSOs is directly linked to their institutional missions and the social impacts caused by them in the environment which they operate in, as per Ebrahim and Rangan (2010). Enjolras (2015) states that these impacts can generate positive or negative transformations in the behaviours and attitudes of people, communities, beneficiary institutions or even main related parties.

Lecy, Schmitz and Swedlund (2012) claim that even in normal situations the TSOs' goals are rarely simple and consistent. Cacheda (2018) complements that the organizations also compete for the same resources or financing in times of economic recession, and, as exemplifies Osborne (2012), their sustainability is weakened. On the other hand, certain institutions may have their operating spaces leveraged, depending on their capacities for social innovation and resilience, as per Shier and Handy (2016).

A survey conducted by NOVA SBE (2020) showed that Portuguese TSOs experienced a drop in revenue and volunteering, and also closed some activity to the public, impacting directly the beneficiaries of their actions. Due to social confinement, Brazilian TSOs also interrupted ongoing projects and partnerships, according to Melo (2020) and had their activities interrupted or suspended, as per Mobiliza (2020).

Previous researches also demonstrated that, despite the impacts caused by Covid-19, there are social assistance activities that can be offered to the population, according to Cardona and Campos-Vidal (2019), when they act by crisis management forefront, in the view of Boyd and Martin (2020).

Therefore, considering the crisis management theory, the goal of this study is to bring up what Portuguese and Brazilian TSOs with good governance did to enhance the social impacts generated to their beneficiaries, starting from the acquaintance of the positive social impacts that can be generated or maximized, and the negative social impacts that can be minimized, due to the effects caused by the pandemic.

2. Theoretical framework:

2.1 The Third Sector

The entities that comprise the Third Sector may vary by country or region, according to Salamon and Sokolowski (2014). Thus, any research work that aims to study this sector must consider the diversity and particularities of its composition.

The Brazilian Third Sector is composed of civil associations in general, cooperatives, foundations, non-governmental organizations, civil society organizations of public interest, social enterprises and social organizations, according to Fux, Modesto and Martins (2017).

The Portuguese Third Sector complements this composition with Holy Houses of Mercy, local development organizations, museums, mutualist associations, social solidarity private institutions (called 'IPSSs'), as per Franco (2005), and still People's Houses, according to the Portuguese Ministry of Labor and Solidarity (1998). The institutionalization of this sector in Portugal was recently reviewed in the Social Economy Basic Law by Assembleia da República (2013).

Moreno-Albarracín et al (2020) point out that one of the most complex challenges currently faced by TSOs is to demonstrate that they manage resources with efficiency and excellence, and do not deviate from their mission accomplishments. Therefore, transparency, accountability and governance are precious values for their survival, given that they generate credibility, legitimacy, and trust, which are necessary to project a positive image to society and to improve their reputations, according to Civitillo, Ricci and Simonetti (2019), Gandía (2011) and Peng, Kim and Deat (2019). These good practices also increase their chances to get future contributions from donors, as per Harris and Neely (2021).

On the other hand, there is not a regulation that obliges the TSOs to publish their financial and non-financial information, according to Ortega-Rodríguez, Licerán-Gutiérrez and Moreno-Albarracín (2020), with some exceptions, like the IPSSs in Portugal and social organizations in Brazil, because they receive governmental resources and need to be accountable regarding their applications, as per Santos, Laureano and Machado (2014) and Fux, Modesto and Martins (2017).

TSOs occupy a strategic position acting for health services provision, as exemplified by Zabdyr-Jamróz (2017), in the social assistance, as highlighted by Feiock and Andrew (2006), among other social goods in general, as per Ortega-Rodríguez, Licerán-Gutiérrez and Moreno-Albarracín (2020). Thus, they have an important relation to contribute to the reach the Sustainable Development Goals (SDGs) of the United Nations (UN) 2030 Agenda, according to Enjolras et al (2018) and United Nations (2018).

2.1 Third Sector crisis management

Bedenik (2020) defines crisis management as an activity aimed at managing a dangerous situation, and Jaques (2007) claims that this process involves four stages: prevention, preparation, response and revision, whose phases give a guidance as to the infrastructure and resources needed, risk management and training for emergency response and actions for crisis incident and post-crisis management.

In a crisis situation, the TSOs sustainability is a little more threatened, but, depending on their capacities for social innovation and resilience, as proposed by Shier and Handy (2016), and the application of appropriate crisis management, as suggested by Boyd and Martin (2020), it is possible to maintain their reputations, according to De Blasio and Veale (2009), and to develop useful and sustainable operations for the community where they act in, as per Lyth et al (2017).

Therefore, in a crisis scenario, Gilstrap et al (2016) and Never (2011) claim that the challenges of TSOs' leaders become more focused at teamwork, transparency to stakeholders, agility in responses, strategic performance, emotional balance and good knowledge of the operating segment, in order to develop a proactive approach to target the best opportunities and to mobilize the best resources in order to achieve the greatest social impacts, according to Austin, Stevenson and Wei-Skillern (2006).

2.1 Covid-19 pandemic through the lens of crisis management

The effects of this global health crisis are being considered bigger than the 2008 financial crisis, as per OECD (2020), and have generated, on all sectors of civil society, social and economic effects and impacts such as:

reducing people interaction due to social distancing; organizations reducing or shutting down their production, or trying to find alternative ways to provide their services; workers looking for other forms of collaboration from home; and unemployment, according to Rigotti, De Cuyper and Sekiguchi (2020) and Sorribes, Celma and Martínez-García (2021).

The impact of the illness is also unequal, with far greater socio-economic and health consequences for poor and marginalized communities, as per Clulow, Dimitrouka and Zapata (2020) and Kang et al (2020), and the lockdown also had a negative effect on mental and physical health, social life, finances, education and food security on children with disabilities and their families, according to Mbazzi et al (2021).

The studies conducted by NOVA SBE (2020) and Bragança et al (2021) showed that the Portuguese TSOs had to: implement a contingency plan for Covid-19 suspected and confirmed cases, as well as hygiene protection measures; cancel face-to-face meetings and adopt tele-working; reduce or suspend services and/or social responses, and still adapt some of them to remote operation; create new services and social responses to the pandemic; lay-off workers and promote the psychological well-being of employees.

The NOVA SBE's survey also demonstrated a perceived decrease in TSOs' revenues and volunteering; cost increase, mostly due to protection, disinfection and safety equipment, but also by increasing expenses associated with food. However, none of these previous studies were based on theoretical framework to understanding the effects and impacts perceived by participants, rather directly on their experiences.

3. Methodology

This study approaches a qualitative exploratory research of the phenomenological type, according to Creswell (2010) and Marshall and Rossman (2016), which aims at exploring and understanding the meaning of the effects caused by the Covid-19 to Portuguese and Brazilian TSOs in order to maintain themselves providing positive social impacts to their beneficiaries. Then, in-depth semi-structured interviews were carried on, whose protocol was developed based on literature review, as per Brinkmann and Kvale (2015).

The semi-structured interview protocol was composed of blocks with questions regarding the interviewee identification with the organization, the activities and goals achieved by the TSOs and their main funding sources, as well as their current beneficiaries. These questions were made in order to classify the organizations in relation to these characteristics. The second block was built with questions related to the effects caused by pandemic as perceived by the interviewees, and how they felt about it.

The third block contained questions on the existing processes regarding those four stages of the crisis management model proposed by Jaques (2007), but specifically what the TSOs did during the crisis and post-crisis phases to maximize the social impacts and minimize the negative ones, the main adopted changes or those that had to be created or abandoned. The focus was on crisis and post-crisis stages in order to observe if any difference was perceived according to the variation in the infection waves and their effects within both countries. Lastly, what learned lessons the interviewees would like to share with other leaders about their experiences on the phenomena.

As there is not a single and complete available list of TSOs in each country (Brazil and Portugal), but a few ones by categories, diversified and incomplete, it was necessary to define a criterion to collecting and selecting the organizations to be invited, as follows:

- Existence of a complete public official record at a governmental base, as guided by Appe (2015), namely the Social Development Ministry, for Brazilian TSOs, and the Social Security, for the Portuguese TSOs;
- Choice of a category to standardize sampling across countries, excluding cooperatives and People's Houses from the Portuguese list, since the Brazilian list does not include them;
- Good practices of governance, accountability and transparency, as guided by Civitillo, Ricci and Simonetti (2019) and França et al (2015), in addition to national or regional coverage; and
- Minimum sample size of 15 TSOs to be interviewed from each country, considering the range of 15 ± 10 proposed by Brinkmann and Kvale (2015).

The selection based on the 'good governance, accountability and transparency practices' criterion was to check the existence in the TSOs' websites of, at least, the publication of the updated statutes and financial and

accounting statements, work plans, activity or management reports, estimated budgeting reports and auditing reports, for the last three years. The outcome was a list of 82 Portuguese and 85 Brazilian TSOs selected to be contacted. The invitations were then sent and 32 organisations (16 of each country) accepted to be interviewed.

The interviews were performed online from December, 2020 to March, 2021 by Zoom® tool, in Portuguese language, with audio and video recorded, and lasted from 25 minutes to 3 hours and a half, approximately. In order to hold their confidentiality, the TSOs were identified as “B” (stands for Brazilian) or “P” (stands for Portuguese) followed by a number 01 to 16.

All the recorded audios had their speeches manually and verbatim transcribed, based on the ethics, as guided by Brinkmann and Kvale (2015), as well as on the validity and reliability aspects in qualitative research, according to Creswell (2010) and Marshall and Rossman (2016). From the transcripts, a detailed abductive content analysis was performed, as per Gioia, Corley and Hamilton (2013).

The content analysis comprised the following steps: 1) Organization of the data by country; 2) Reading of all data collected from literature review combined with the interviews in order to get a general perception of the collected information related to the research topic; 3) Building the primary data coding in categories, themes and subthemes, based on the literature review; 4) Coding of the interviews and addition of categories, themes and subthemes emerging from them; 5) Detailed description of the data and proposition of subjects consolidated according to the relationships among them; 6) Proposal of a narrative between the findings according to this early-stage research scope.

Although the research might initially seem to have a sample source limitation, since the primary data was collected from the available government list with a limit in the number of organizations, the experiences reported by the interviewed TSOs’ presented saturation in the analysed time period. That indicates that the sampling does not need to be augmented.

4. Results and discussion

The first finding of this early-stage research has been the lack of complete official registrations of the TSOs. Considering about 782 thousand Brazilian TSOs, as per IPEA (2021), and 55 thousand Portuguese TSOs, according to Suspiro (2016), the only available lists represent 2,6% and 10% of the total TSOs from each country, respectively.

Out of the interviewed TSOs universe, only three were prepared to deal with crisis emergencies because they had already dealt somehow with hunger, poverty and health impacts similar to those caused by the Covid-19 pandemic. Additionally, only one of them had a crisis management process in place, and a few had contingency plans, even though all of them had to be revised in order to address the effects and impacts caused by pandemic.

In addition, even the TSOs that claimed to be prepared to handle the crisis had an increased demand and a decreased volunteering, so that they had to look for further resources, as stated by Shier and Handy (2016). They had to be more innovative as to giving responses to beneficiaries, according to Austin, Stevenson and Wei-Skillern (2006). As it can be seen from an extract of the P01’s interview, the activities developed by that TSO did not stop:

“...we had more requests, many more requests, people asking for support [...] On the other hand, we had fewer volunteers, because the older ones stayed at home to protect themselves. Then, we had to look for more volunteers. There were no economic consequences in terms of activity because we did not close. On the contrary, as we had more requests, we had to look for more donors and to be more innovative on inputting resources, revenues and donations.” (P01)

Also, most of the interviewed TSOs had their social responses limited or closed during the restricted measures of social distancing, as shown below from the statement excerpt of the P03’s interview:

“...the parent groups really stopped, mainly because, in the territories where the activities are carried out, the spread of the virus was felt the most. In the social districts of Lisbon there was an immense spread, there were many schools that closed, and they keep on closing.” (P03)

In addition to the containment measures such as the closure of social responses, the statement above also confirms that the more vulnerable regions, and consequently people, were those more affected by the spread of the virus, as stated by Clulow, Dimitrouka and Zapata (2020) and Kang et al (2020).

In spite of the negative impact of interrupting the face-to-face activities in the lockdown, the adjustment to the digital world gave the TSOs the opportunity to create positive impacts in terms of fundraising and to capturing new users:

“The institution gained tremendous visibility during confinement. All the activities that we promote for families and technicians online have gained tremendous visibility. We were not expecting anything; however, we easily exceeded twelve thousand followers [...], almost doubling in just two months. And we have contact with institutions that we did not have before. It was really good.” (P03)

Furthermore, a TSO overcame the previous need to perform every task face-to-face:

“We clearly had to adapt, [...], especially to those already ongoing services, passed to online format. I think this has increased our expertise in the use of these tools, [...] and, in some contexts, has allowed us to deconstruct the notion that everything has to be done in person. It does not.” (P06)

From the expansion to digital world and innovation, the TSOs were able to provide equipment to users that allowed them to minimize the impact of interrupting the face-to-face activities, as well as to keep the responses, working and still organizing and expanding the participation in events that previously were physically attended, as it can be seen from the quotes of the P05, P06, P07 and B09 interviews:

“...we had already invested in tablets and technologies to allow families to keep in close contact. It is one thing for us to say it is okay, and it is another thing for them to see and talk to their children, to their parents, yes, it has another impact.” (P05)

“So, the communication channels were, above all, important. The campaigns were launched on Facebook, on social networks and on our website, [...] and we never closed the online and telephone channels at any time [...] All telephones at the offices were routed to the manager and employees [...], this integration is what allows people, whatever the communication channel, to enter and ask for help or to report a situation, which is addressed and which a response is given to.” (P06)

“Our conference was physical; it was always physical. With the Covid issue, our main leaders immediately thought outside the box. So, they prepared within, I think, one month, something that no institution has done recently, and I do not know if any would, broadly in the Zoom application, very beautiful with rooms and auditorium [...] We had more themes and more visitors than if done in Lisbon [...] and everything was made in-house by our volunteers...” (P07)

“We used a combination of platforms because they had different schedules. We had a conversation group on Facebook for people in social vulnerability [...] and we activated several programs on YouTube [...], so we managed to bring science content, well-being content, [...] general interest content. Then we managed to mix music with interviews, with the curator's speech, [...], we did a merge, nothing different from what was already happening within four walls. We used Zoom to do webinars and courses. And that increased our impact.” (B09)

Some TSOs (e.g., B01) took advantage of corporate social responsibility, working with companies to obtain donations of equipment and mobile phone chips that enabled users to remote learning:

"[...] we are already negotiating with a telephone company to donate 15 thousand chips, for free, for 16 months [...] and we have also managed to make a deal with a large construction company here in Sao Paulo [...], and we gained tablets with chips and 4G, and we sent them to the young people's homes to be able to attend synchronous classes." (B01)

However, there are social responses which depend on the trust environment created between the TSO and their users. So, the assistance has to be carried on with more attention on details and from the development of new skills by workers and volunteers:

"But over the phone, we had to start paying attention to the silences, the tones of voices, the crying, the sigh. From the tone of voice, you can tell if the person is anxious, sad, crying or had been crying. With volunteers we do the same and guide the same, because volunteers are our eyes. In person it was easier, because they observed things, for example, if the medication tray was untidy, if the person was not well..." (P08)

In order to mitigate the economic negative effects, the TSOs also act together with their boards to lower the financial co-participation from those users that had their incomes partially or totally impacted by unemployment:

"The day care centres, for example... As soon as we closed, it was decided by the Board of Directors to reduce the monthly fee to these social responses that ended. However, there were other parents who also asked us to reduce tuition because they were unemployed or were in a more precarious situation, and we acceded to all the requests they made to us." (P05)

Although several primary social responses were not the provision of food and financial aid, several TSOs reported that they had to adjust their budgets to providing resources and food to beneficiaries, to their families, to people who take care of them and to anyone else who looked for the TSO:

"...there are also families that need to supply the most basic need: to feed. But we quickly realized that the needs went beyond that. We started to have people who came to us for help in paying rent, electricity, water and gas." (P15)

Other TSOs took advantage of the need to providing food and hygiene and cleaning products to their beneficiaries, whose demand touched companies to establish new partnerships:

"The [B03] is not an organization created with the intention of being assistentialist, but at the time of the pandemic, this campaign we created has a completely assistentialist character, which is to bring basic baskets and hygiene kits for families. We saw it as a moment really necessary; on the other hand, it may even be an opportunity to bring partner companies that, at first, will make donations to this campaign and, in the future, we can have them commit to other projects that are not so assistentialist." (B03)

Considering the universe of interviewed TSOs, only three Portuguese organizations had as a goal to reach the first and/or second United Nations' SDGs, related to fight against poverty and hungry directly. But after the Covid-19 pandemic, all of them, in both countries, had to develop actions to help their beneficiaries with their basic needs.

Additionally, those TSOs that work with prevention of violence or child abuse, where social distancing kept them from following events more closely, took advantage of the demand for food supplies in order to visit families and identify potential risk situations:

"...we developed a response plan which was the supply of basic food baskets, bringing food to families, but together with the issue of child protection and sexual abuse, because these children have been at home for almost a year with their families and we do not know what is going on with them, so by visiting the children, visiting the houses, one is able to identify the abuses..." (B10)

No interviewed organization had to shut down employees due to the decrease in revenues, but some put their workers in lay-off regime or shifted their teams to the responses that continued to work, where face-to-face service centres had to be closed:

“...we can also see that people adapt easily to areas that are very different, because it is not the same thing to treat a child and to treat an adult [...] but people have somewhat easily adapted themselves.” (P05)

In order to minimize the emotional effects caused by pandemic, all the Brazilian TSOs and 14 Portuguese TSOs reinforced the social and psychological support to its employees, as well as to their beneficiaries. Additionally, in all the interviewed organizations, the leadership adapted their work modalities to keep closer to their teams, through more constant meetings and the use of social interaction applications.

Most Brazilian TSOs claimed to be hard to establish a dialogue with the government to assist in the development of social impact actions that could help mitigate the effects caused by the pandemic.

Finally, all interviewed organisations mentioned that they would have a more complete picture of the social and economic effects caused by the Covid-19 pandemic in the medium and long term.

5. In conclusions

Despite the crisis scenario and the fact that organizations are neither prepared to deal with crises nor have crisis management processes, the sampled organizations did not have a reduction in their resources that have drastically impacted their operations, in contrast to what previous studies stated.

The responses that had to be interrupted were impacted due to mobility restrictions and social distancing. However, with creativity, social innovation and the use of information and communication technologies, the TSOs managed to carry on most of their social responses remotely, in reduced groups or by meeting new emergency demands not foreseen in their statutes, such as the supply of food, hygiene and cleaning materials, and the payment of household expenses, expanding the contribution to other United Nations' SDGs previously not contemplated in their original lines of action and helping the government in that social mission.

Besides that, by negotiation capability, they were able to develop partnership strategies to manage the current needs and to gather future partners to new projects or demands.

The TSO leadership was also important to control the adversity with resiliency in order to keep a healthy environment, to motivate workers and to mobilize volunteers who could continue on the field, as well as to touch social bodies for quick decision-making regarding some increases in spending or reallocation of resources.

The criterion for selecting TSOs with good governance practices is proven to be a relevant factor to this research because well managed organizations were capable of leading actions, projects and budgets with the necessary effectiveness to meet their beneficiaries' demands and to act in a coordinated manner with their stakeholders.

The ongoing analysis of the outcomes of this work is not only leading to the knowledge of the main effects and impacts caused by the pandemic, but also to the possibility of proposing a crisis management model that contemplates the processes arising from the resilience strategies and attitudes adopted by the interviewed TSOs.

The main research limitations are related to: the limited number of TSOs in the available TSO lists of official public government records in the countries surveyed; the TSOs' scope of actions restricted to national or, at least, regional coverage; and the effects and impacts caused by Covid-19 pandemic not fully perceived and collected during the time period of the interviews because the pandemic was still underway in both countries. Consequently, other processes implemented or lessons learned might have been not completely captured then.

As a suggestion for future works, a new round of interviews could be held with the same interviewed TSOs in order to bring up some new findings regarding the topic, considering the different aspects of the infection waves. In addition, due to method limitation, further research may be performed from a larger sample of interviews, and a complementary survey research can be assessed, either with the same geographical scope or encompassing other European countries' TSOs for comparison.

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