

# GULBENKIAN HUMAN DEVELOPMENT PROGRAMME

## ANNUAL REPORT



CALOUSTE GULBENKIAN  
FOUNDATION

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# 2015

## GULBENKIAN HUMAN DEVELOPMENT PROGRAMME

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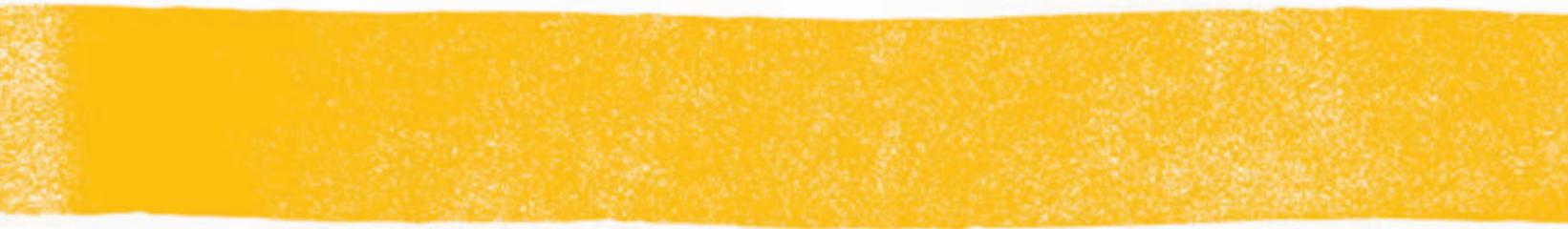
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june 2016



GULBENKIAN HUMAN  
DEVELOPMENT PROGRAMME

ANNUAL  
REPORT  
2015



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# OPENING MESSAGE

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The mission of the Calouste Gulbenkian Foundation is to foster knowledge and improve quality of life through the arts, charity, science and education.

The Gulbenkian Human Development Programme is one of the operational units that contributes to this mission through charity, and it has designed an intervention plan for the period 2014-2018 based on the conviction that it is possible to construct an inclusive and people-friendly society, and that in order to fight inequalities and social injustice it is necessary to support organisations active in the social sector, so that they integrate with and speed up the process of development of a convergent economy.

We think about people, we work for them and, above all, with them. If there is a lesson that we should all have learned by now, it is that nothing should be done without the involvement of the recipients of the interventions, because they are the main agents of their own change.

These paths are forged by deepening knowledge and anticipating phenomena, promoting reflection and open debate, risking innovation and experimentation, mobilizing new public and private partnerships, working within networks, and above all leading through example, making use of our independence to strengthen our power to bring people together.

**Lúisa Valle**

*Director of the Gulbenkian Human Development Programme*

# GULBENKIAN HUMAN DEVELOPMENT PROGRAMME

## ANNUAL REPORT 2015

## MISSION

**The mission of the Gulbenkian Human Development Programme (GHDP) is to promote social inclusion with a view to transforming our society, making it fairer and more cohesive.**

## OBJECTIVES

The Gulbenkian Human Development Programme strives to encourage and facilitate the inclusion of the most vulnerable groups in society through the following specific objectives:

- Promoting the social integration of the most vulnerable people.
- Enhancing the efficiency and effectiveness of social organizations.
- Deepening knowledge through the study of social problems, promoting discussion by putting forward solutions, and influencing public policy and behavioural change.

## HIGHLIGHTS

In 2015, the GHDP continued with its work around the priorities defined for the 2014-2018 period, which encompass the following: *People in an Inclusive Society*, *Social Organizations for a Converging Economy* and *Knowledge and the Future*.

Among the work carried out over the course of the year, we would like to highlight the PARTIS (Artistic Practices for Social Inclusion) Programme, which completed its second year and was the subject of the exhibition *Isto é PARTIS (This is PARTIS)*, held in various Gulbenkian Foundation venues on the 10<sup>th</sup> and 11<sup>th</sup> of July. Over the course of these two days,

documentaries were shown and photography exhibitions were held along with theatrical, musical and circus-art performances that highlighted the achievements of the projects approved in 2013. The second edition of the competition, which, in December, approved sixteen new projects for the three-year period between 2016 and 2018, was also launched. At the end of PARTIS's second year, the programme had staged 7963 activities and 321 events (with 37,636 visitors) involving 5791 direct participants.

Mention must also be made of the Social Investment Laboratory, which launched the first Portuguese Social

Impact Bond, an innovative not-for-profit funding mechanism whose pilot project, the Junior Code Academy, explores the teaching of computer programming as a way of improving school results. We would also like to highlight the *Social Innovation World Forum*, organized by this laboratory, which brought countless international specialists in the field of innovation and social investment to Portugal in June.

In 2015, the Gulbenkian Human Development Programme awarded a total of 82 grants, 29 of which were for pilot projects that explore new responses to a range of problems currently facing society, helping around 25,000 direct beneficiaries across the country.

## ASSESSMENT

In 2015, the GHDP presented the External Perception and Assessment Report, which sought to identify the Programme's strong points and the areas in which it could be improved. The report was based on a survey completed by around twenty organisations supported by the Programme.

A reporting model that makes it possible to carry out a standardised assessment of the main projects supported was also developed.

## MEDIA

The GHDP attaches great importance to the publicising of its initiatives and projects, in particular through the website, the microsite, the newsletter, media partnerships and participation on social media.

In 2015, it strengthened its commitment to social media campaigns, particularly on Facebook, which became the main medium used for advertising as a result of the advantageous cost-benefit relationship that it offers.

The GHDP continued to make significant use of audiovisual media to publicise its projects. In this regard, the PARTIS Programme took the pioneering decision to provide full subtitling of its contents in Portuguese and

English to ensure that the message concerned reaches the greatest possible number of people.

Where the media is concerned, its presence was enhanced: over 350 references to it appeared in various forms of media, including the international press. A partnership was also created with the *Jornal de Negócios* to publicise the Social Investment Laboratory.





# GHDP IN NUMBERS

**25000**

direct beneficiaries



**82**

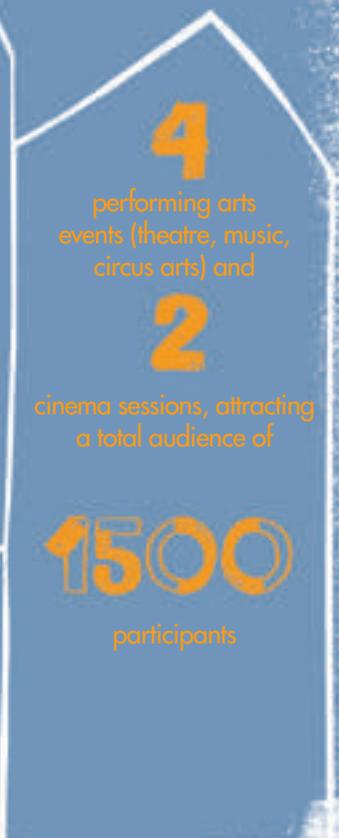
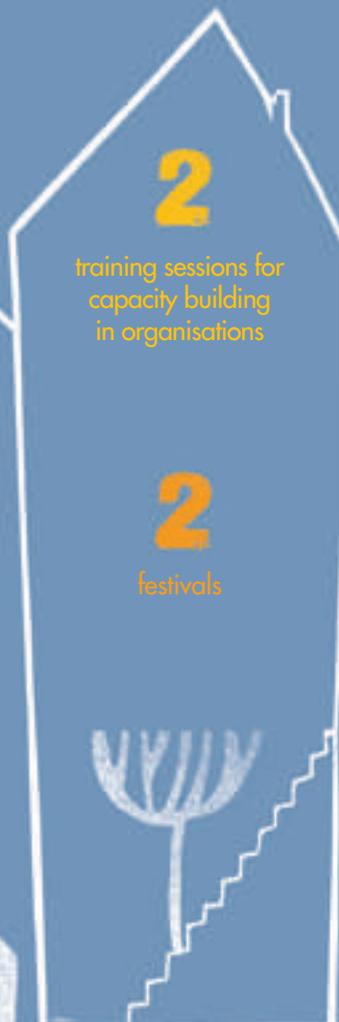
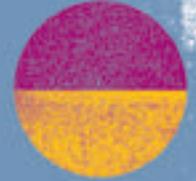
grants



**29**

pilot projects





## CHART OF PROJECTS SUPPORTED IN 2015

- 1 Almada
- 2 Amarante
- 3 Arcos de Valdevez
- 4 Aveiro
- 5 Cascais
- 6 Castelo Branco
- 7 Coimbra
- 8 Évora
- 9 Lagoa
- 10 Leiria
- 11 Lisbon
- 12 Loulé
- 13 Loures
- 14 Moita
- 15 Montemar-o-Novo
- 16 Oeiras
- 17 Ponta Delgada
- 18 Porto
- 19 Reguengos de Monsaraz
- 20 Santo Tirso
- 21 Setúbal
- 22 Sintra







# PEOPLE IN AN INCLUSIVE SOCIETY

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*Promoting the social inclusion of the most vulnerable people through experimental, replicable projects based on strategic partnerships. In this sphere, our main areas of activity include the promotion of employment; the improvement of the quality of care provided to children and young people at risk, the elderly and the disabled; and community development.*

# THE PROMOTION OF EMPLOYMENT



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## MOVIMENTO PARA O EMPREGO (EMPLOYMENT ACTION)

This initiative involves a partnership with the Institute of Employment and Professional Training, COTEC Portugal and a vast network of companies, which, acting out of a sense of social responsibility, have committed themselves to making 5000 professional internships available to young unemployed graduates or postgraduates, giving them the opportunity to complete their training within a company and thus increasing their employability. By May 2015, at the end of the two years scheduled for the scheme, 5474 internships had been approved by over 300 member companies.



## FAZ – IDEIAS DE ORIGEM PORTUGUESA (IDEAS OF PORTUGUESE ORIGIN)

The competition Ideas of Portuguese Origin invites Portuguese citizens who live and work abroad to contribute ideas for social entrepreneurship projects that constitute new and better responses to the challenges currently facing the country, specifically in the areas of social inclusion, ageing, intercultural dialogue, the environment and sustainability.

In the 2015 edition, 54 ideas were submitted to the competition and the ten best ideas were selected as finalists. The finalists received long-distance training and assistance from the Social Entrepreneurship Institute to transform their ideas into a social business model and also attended an intensive, face-to-face training workshop which culminated in the presentation of their projects to the jury. The winners were announced on the 11<sup>th</sup> of June at a ceremony attended by the President of the Republic. In this edition, the winning project was *Rio Frio | Território Criativo (Rio Frio | Creative Territory)* while *TEIA | Transforming Emigration Into Action* and *Webradio para Crianças*

(*Web Radio for Children*) finished in second and third place, respectively.

The winning projects received a total of €50,000 as seed capital to enable them to be implemented. Every finalist was also supported and supervised for nine months as part of the Calouste Gulbenkian Foundation's continuing commitment to supporting the talents of Portuguese communities throughout the world, connecting them to the challenges and opportunities facing Portuguese society.

# 2015 WINNERS

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## RIO FRIO | TERRITÓRIO CRIATIVO (CREATIVE TERRITORY)

The aim of this project is to reduce the occurrence and propagation of fires in woods and forests through silvopastoral systems, helping to increase good practice in planning and managing the mountain landscape.

## TEIA | TRANSFORMING EMIGRATION INTO ACTION

This initiative aims to promote and develop links between Portuguese citizens and Portuguese companies both within the country and abroad through the creation of (among other things) an online platform that will reduce distances and facilitate communication.

## WEB RADIO FOR CHILDREN

This project creates a tool for teaching, exploring and preserving the Portuguese culture and language. It is aimed at Portuguese-speaking emigrants and communities around the world and is intended to prevent their descendants from losing contact with these reference points.





## MUNDAR

This is an annual competition sponsored by the Choices Programme with the support of the Calouste Gulbenkian Foundation. It is aimed at young people aged between 16 and 30 who have an idea for solving a problem affecting themselves as individuals, their communities, or society in general. Following the opening of the competition in 2014, 40 ideas were selected for a pitch session and 36 of these have since been selected as the winning entries.

Over the course of 2015, the chosen teams implemented their ideas with the financial support awarded by the competition. They benefited from access to training sessions with the support of Junior Achievement and Accenture.



## PORTUGUESE COALITION FOR DIGITAL EMPLOYABILITY

The European Commission is leading a partnership that aims to bridge the digital skills gap in Europe and to fill jobs in the area of Information Technology and Communication (ITC). It is estimated that there will be a shortage of 900,000 ITC professionals in 2020, constituting a serious hindrance to recovery and economic growth. In Portugal, the gap between supply and demand is more alarming in that there is a high level of unemployment, particularly among the young. At the same time, countless companies and institutions, particularly SMEs (which constitute a significant part of the Portuguese business network) do not make use of ITC, which restricts the development of the digital economy on a national level.

In view of the situation described above, several key national stakeholders, motivated by this intention, agreed to form the Portuguese Coalition for Digital Employability and to work together to draw up a proposal for a National Strategy and Action Plan for Digital Employability 2015-2020. The proposal, which is



based around several key pillars, was intended to be submitted to government figures in the areas of economics, education, science and employment and was presented in June 2015.

The aims of the National Strategy and Action Plan for Digital Employability 2015-2020 are as follows: to reduce significantly the shortage of ITC professionals; to bring about continuous improvement in the working population's opportunities to acquire the ITC skills needed for employment in the public and private sectors as well the skills of the general public; to leverage the number of companies that make use of digital technology and the number of digitally-based companies; and to develop the digital economy and markets.

## SALVADOR ASSOCIATION

Since 2008, the Salvador Association has held the Quality of Life Action competition on an annual basis. This competition is intended to provide direct and ad-hoc support to physically disabled persons whose social integration may be hindered by a lack of financial resources, aiming to improve their quality-of-life and to facilitate their participation in social life, sports and the labour market.

Until 2014, the support provided by the GHDP was aimed at the area of *Improving Quality of Life*, which included support for purchasing electric wheel chairs and other devices that facilitate mobility. In 2015, it began to focus on the area of *Training and Employability*, which supports vocational training and integration.

# IMPROVING THE QUALITY OF CARE



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## CUIDAR MELHOR (BETTER CARE)

With the aim of responding directly to the needs of people who care for dementia sufferers, diagnosing the incidence of the problem, and training, informing and raising the awareness of professionals and the general public, the Cuidar Melhor (Better Caring) project was created in 2012.

The Calouste Gulbenkian Foundation, the Montepio Foundation, the Portuguese Alzheimer's Association, and the Health Sciences Institute of the Catholic University of Portugal, in collaboration with the municipalities of Oeiras, Cascais and Sintra, helped to create municipal offices made up of multidisciplinary technical teams to respond to the needs of families, professionals, and institutions that care for people with dementia.

The project has been able to continue thanks to the support provided by the funding foundations. Nevertheless, a process of transition is underway to the municipalities involved. In 2015, 523 appointments and 538 clinical services were held in the 3 offices concerned. The 25 awareness-raising actions

attracted 1318 participants and 230 professionals took part in the training activities. The workshops held in the municipalities of Oeiras, Cascais and Sintra attracted 230 family and professional carers.

The possibility of opening a Better Caring Office in Porto is currently being examined.

Created as part of the Better Caring project, the Memory Café was set up to allow carers and patients, who can tend to become isolated, to socialise and also to provide guidance and direction to family-member carers. It aims to create an environment that is informal enough to allow experiences, difficulties and constraints on providing care to be shared. In 2015, four new Memory Cafés were set up in Oeiras, Viseu, Braga and Guimarães, joining those already established in Lisbon, Cascais, Viana do Castelo and Porto. In total, the Memory Cafés welcomed 463 participants. It is estimated that 20 Memory Cafés will be operating in 2017.

## YOUNG PEOPLE IN RESIDENTIAL CARE

Since 2012, the Gulbenkian Foundation has been developing a series of initiatives aimed at children and young people in care under the umbrella of the Protection and Promotion System. Four projects were therefore supported in four care institutions of varying kinds located in different parts of the country. The main goals of these projects were to increase young people's independence by preparing them for life after care and to enable young people who had been taken away from their families to develop their personal and social skills and their emotional self-regulation. To enable them to integrate fully into society and to sustain themselves after leaving the institution, young people were taught about and given training in daily activities such as running a home, preparing food and managing resources. They were also given civic training and training in the prevention of risky behaviour.

The needs of institutions were also identified and initiatives were developed to train the technical and educational teams to improve their ability to work with the 201 young people who benefited from these projects as well as future residents.



Each of the projects explored a different intervention methodology: the Via Nova Association (Vila Real) opted to work closely with families to prepare them for the possible return of young family members in care; the São José (Braga) Office began by encouraging the supervised execution of domestic tasks, appointment making and trips to the supermarket; at the Casa do Canto (Ansião) a structure was created to support and supervise young people who had been institutionalised; and at the Lar de Nossa Senhora de Fátima (Reguengos de Monsaraz), the entire organisational culture was changed, with particular attention being paid to the training of human resources and the personalisation of spaces to make the home a more familiar and welcoming place.

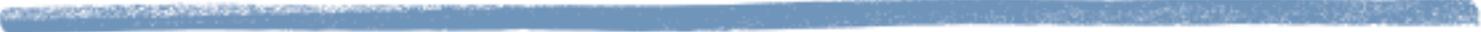
These projects involved 79 specialists and managers and 70 organisations that established local partnerships.

In parallel, and with the aim of training specialists and organisations, three meetings with specialists in the field,

one international conference and six workshops were held over three years (2012-2015). Five thematic brochures, coordinated by the technical supervision team working on the projects, with contributions from specialists at the institutions, were also published.

The scientific supervision and monitoring of these projects was carried out by lecturers/researchers at the University of Coimbra, the University of Trás os Montes e Alto Douro and the Higher School of Education of the Polytechnic Institute of Lisbon.

A final publication that will examine the main results and recommendations arising from this trial is currently being prepared and is scheduled to be released in 2016.



## SPIN

This project works with children who are victims of abuse or neglect and who are living in care or in foster homes in Évora, Alandroal, Reguengos de Monsaraz and Campo Maior, as indicated by Évora Hospital and by the Alandroal Parish Social Centre. The initiative is run by these two bodies and is funded by the Gulbenkian Foundation, the Montepio Foundation, and Delta Cafés.

The activities comprising the project are based on the life-history methodology and involve individual supervision which is monitored and assessed throughout the process in accordance with parameters related to self-esteem, the ability to concentrate, the management of frustration, and interacting with others with a view to creating new life plans.

On the initiative of Richard Rose, the project supervisor and the mentor for this working methodology, this trial will be discussed in a publication written by him that is currently being prepared. Four children in care and six children in foster homes are being supervised.

## BANCO DO BEBÉ (BABY BANK)

The Baby Bank is an initiative run by the Associação de Ajuda ao Recém-Nascido (Association for the Support of Newborn Babies). At the Alfredo da Costa Maternity Hospital (MAC), where Baby Bank was set up and where it has been operating since 2012, the initiative forges relationships with families who need its support and works not only to provide primary care to babies while they are still in the maternity hospital but also afterwards, when they are at home, by organising and providing clothes, food and hygiene products.

In addition to the MAC, which represents around half of the supervised families, the Baby Bank has established new partnerships with the Santa Maria Hospital (Lisbon) and the Beatriz Ângelo Hospital (Loures). Its work in conjunction with other key institutions such as the Santa Casa da Misericórdia, the Campo Grande Parish Social Centre and Committees for the Protection of Children and Young People has also helped to ensure that the needs of families are appropriately met.



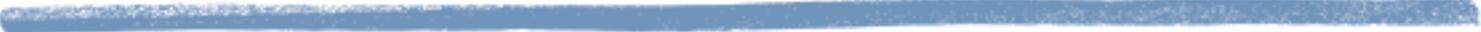
In the first three quarters of the year, 48 families were supervised at home. In parallel, three thematic workshops were held on the importance of massage for babies, play, and meeting peers. Help was provided to a total of 113 families.

## CADIn SETÚBAL — SOCIAL SERVICES

The Child Development Support Centre (CADIn) works to tackle development issues or mental health problems in children and young people. It has a multidisciplinary clinical and technical team, encompassing child psychiatry and rehabilitation, among other disciplines, and aims to provide children with solutions suited to their needs.

The Bolsa Social (Social Service) project, developed at the CADIn in Setúbal, seeks to ensure that all children and young people with special needs have access to the care that they need, regardless of the family's economic resources and situation and regardless of whether or not they live in care.

Families who lack the means to pay for the cost of an intervention of this kind may request help from the Bolsa Social, which will bear a significant percentage of the cost of consultations, assessments and therapy. The Bolsa Social currently supports 17 people who have benefited from 12 consultations and 144 therapy sessions.



## CARE – SUPPORT NETWORK FOR CHILDREN AND YOUNG PEOPLE WHO ARE VICTIMS OF SEXUAL ABUSE

The sexual abuse of children and young people constitutes a serious violation of their rights and their physical and mental integrity. It is a complex social problem which has a highly adverse and lasting impact on children, who require an integrated approach involving several bodies and professionals working closely together. Owing to their age and their cognitive and emotional development, children and young people who are victims of sexual abuse represent a particularly vulnerable at-risk group.

The CARE project, which is run by APAV (the Portuguese Victim Support Association) is developing a support and referral network for cases of sexual abuse affecting children and young people. The project is supported by a partnership which, by working in a collaborative manner, can provide victims and their families with specialised support, taking into account the defence and promotion of the rights and interests of these victims of sexual crime. This project began in late 2015 and will continue until the last quarter of 2017.

## PLAYGROUPS FOR INCLUSION

The *Playgroups for Inclusion* project (or in Portuguese, Grupos Aprender, Brincar, Crescer) is experimenting with a response to the needs of children aged four and under who do not attend any type of formal educational service (crèche or nursery) and their families.

Conceived by a network of foundations concerned with children from vulnerable families who have serious difficulty integrating into society, this project undertakes early intervention in order to break the intergenerational transmission of poverty and exclusion. The project receives EU funding and the partnership, which is headed by the Ministry of Education and Science through the General Directorate for Education, is made up of the Bissaya Barreto Foundation, the Faculty of Psychology and Educational Science of the University of Coimbra, the ISCTE (University Institute of Lisbon), the Calouste Gulbenkian Foundation and the High Commissioner for Migration.



## NOTAS DE CONTACTO – PORTUGUESE SOLIDARITY CHAMBER ORCHESTRA

### 1 STEP +

In 2015, support was completed for a pilot project that worked with fifty disabled people. Thanks to this initiative, the people concerned had the opportunity to learn music and express themselves through it. The project, which is run by the Portuguese Chamber Orchestra (OCP) in partnership with Cercioeiras, took part in the second edition of the PARTIS competition and was selected to receive new funding for the next three years. In 2015, in conjunction with experienced musicians, the participants in the project gave several public performances, including one that took place at the end of the year at the Open Theatre.

This project aims to reduce recidivism and to effectively promote the social inclusion of a group of 60 youth and young adults who are imprisoned/confined at the Linhó Prison Establishment and the Padre António de Oliveira Educational Centre and are approaching the end of their sentences. The intervention is based on an innovative methodology (peer-based education/mentoring) carried out by the Johnson Academy over three years.



## OFICINAS DE PAIS (PARENTING WORKSHOPS)

This initiative was created to help parents with disabled children to guide their children in the process of integrating into society, enabling them to support other parents in similar situations under the supervision of professionals.

Over the course of the project, the number of people involved increased and its geographical scope was extended, eventually leading to the establishment of 60 emotional support groups, actions in 14 districts and the involvement of 550 parents. The Parenting Workshops operated in partnership with the Associação Pais-em-Rede parents network, the University Institute of Psychological, Social and Life Sciences (ISPA), the General Directorate for Health and the Calouste Gulbenkian Foundation.

In order to bring together parents' testimonies and to publicise the initiative and the results achieved, the Foundation supported the publication of the brochure *Networks Built by Parents*, which came out in December 2015.

## ISOLEARN – INNOVATION AND SOCIAL LEARNING IN HEI

Supported by the Erasmus + Programme, this project is aimed at developing a quality, inclusive higher-education model and proposals for tools that focus on the needs of blind and deaf people. In addition to the Gulbenkian Foundation, the project's Portuguese partners include the Universidade Aberta, the Portuguese Association for the Blind and Visually Impaired (ACAPO), and the Portuguese Association for the Deaf (APD). Its international partners include the University of Ljubljana (Slovenia), the Universidade Telematica Internazionale – Uninettuno (Italy), the Italian Association for the Development of Human Resources (*Associazione per lo Sviluppo Organizzativo e delle Risorse Humane – EFFEBI*) and the University of Upsala (Sweden).

A workshop and an international seminar are scheduled to be held in Portugal in 2016.



## APPS FOR GOOD

This innovative project was developed by CDI Portugal with the aim of raising young people's awareness of the problems facing their communities and enabling them to find new solutions to these problems through the use of information and communication technology. It should also be noted that digital skills will be highly important for their future employability.

As part of their extracurricular activities, the young people concerned are challenged to develop technical solutions in the form of applications that help to solve a problem facing their school or the community in which they live. This initiative replicates a model that was successfully trialled in the United Kingdom.

In the first year of the project, corresponding to the 2014-2015 academic year, 300 pupils and 32 teachers from 16 schools took part, developing a total of 50 applications. The results of this edition were presented at the Gulbenkian Foundation in

September with an exhibition featuring the projects and prizes for the best applications.

The second edition of the initiative is now taking place, involving 1300 pupils and 140 teachers from 67 schools. It is estimated that 220 applications will be developed.

The partnership established for the purposes of the initiative is made up of the Directorate General for Education, Microsoft, the Gulbenkian Foundation and the EDP Foundation.



## PATIENT INNOVATION

The Gulbenkian Human Development Programme joined forces with the Gulbenkian Programme for Innovation in Health to support the development of the *Patient Innovation* platform, a multilingual, not-for-profit international social network that allows patients and carers to share solutions they have created for themselves or the people in their care to improve their quality of life. For example, a patient with an apparently incurable problem in the aortic artery developed a valve for himself that was successfully implanted by his doctor, thereby resolving the issue. Following this experience, another 30 patients across the world have now benefited from this valve model. This is the kind of information sharing and mutual assistance that drives this initiative.

The project is led by the Católica Lisbon School of Business and Economics and is the result of international cooperation involving the following partners: the Information and Communication Technologies Institute, Carnegie Mellon Portugal, the Portuguese Foundation for Science and

Technology, MIT Portugal, Peter Pribilla-Stiftung, the Institute of Molecular Medicine, and Innosabi.

In July, the Foundation presented the *Patient Innovation* awards for the first time as part of the work carried out by the international conference *Open and User Innovation*. Awards for the most outstanding innovations were given to three patients, two carers and one collaborator from the United States, Israel, the United Kingdom and Portugal.

Over 500 solutions shared by patients and carers from 30 different countries are currently available.



## PREVENTION IN MOURARIA

This project prevents and tests for infection by HIV and other infections and connects migrants living in the neighbourhood of Mouraria with the relevant services. As well as focusing on health, intervention of a social nature has also proved to be essential in overcoming many of the difficulties that face these communities and hinder their access to services, specifically with regard to the obtaining of documents and social benefits.

This response has been recognised by the people concerned and currently constitutes a reference point for those who wish to have regular testing and a unique opportunity for those who have never been tested. In 2016, a cohort study will be implemented in partnership with the Public Health Institute of the University of Porto to attempt to shed light on the way that the behaviour of people who return to the centre evolves.

This project, which stems from a partnership between the Portuguese Activists' Group on HIV/AIDS Treatments, Lisbon Town Council and the Calouste Gulbenkian Foundation,

has been earmarked as an example of good practice by the World Health Organisation in the latest guidelines on testing published by the organisation.



## NATIVE SCIENTIST PROJECT

This project aims to improve the academic performance of 100 children of Portuguese emigrants by arranging for Portuguese scientists and postgraduates to visit the schools that they attend, interacting with them and speaking about science in Portuguese.

# COMMUNITY DEVELOPMENT



## O NOSSO KM<sup>2</sup> (OUR SQUARE MILE)

*O Nosso km<sup>2</sup>* emerged from the Calouste Gulbenkian Foundation's firm belief that building solid neighbourhood networks, not only between citizens but also between local companies and institutions, is essential in providing an efficient, innovative and timely response to the problems facing communities.

*O Nosso km<sup>2</sup>* is therefore being implemented in the area where the Gulbenkian Foundation is physically located, i.e., in the parish of Avenidas Novas in Lisbon.

In 2015 the project consolidated its presence in the area, focusing on the priority actions that have been defined: loneliness among senior citizens, unemployment among women and the young, and educational failure and absenteeism. The approach to these priorities took several factors into account: the mobilisation of the community, the collective construction of knowledge, the creation and maintenance of shared spaces, the valuing of local talents and resources, and integrated governance. This intervention was also made possible by collaboration with other units pertaining to the Foundation, such as the Calouste Gulbenkian Museum and Descobrir (Discover).



The project has helped to boost community cohesion, promoting social activities that bring together residents of all ages and backgrounds and involving local organisations and authorities.

In the area of educational failure and absenteeism, the project mobilised local resources, including companies, to support a training model for educational success made possible by the EPIS Association. This model is being applied in the Marquesa de Alorna Schools Group, which is considered to be an educational territory of priority intervention.

We would also like to mention *Marketplace O nosso km<sup>2</sup>*, which brought together companies, social organisations and citizens' groups at the Gulbenkian Foundation. The event, which took place in December, consisted of a social market and aimed to stimulate and facilitate the supply, exchange and demand for resources such as voluntary work, services and material goods. Cooperation was encouraged between companies and not-for-profit institutions and the many partnerships that were established had a social impact estimated at €157,000.

Also in December, the Calouste Gulbenkian Foundation opened its doors to the community and invited residents, social organisations and public bodies to participate in a series of workshops devoted to reflecting on and creating local responses to the social problems of educational failure, isolation among the elderly and unemployment.

In addition to Lisbon Town Council, Gebalis, the Santa Casa da Misericórdia, and the Padre António Vieira Institute, the project partners included the Pórticos Foundation, the New University of Lisbon, the Catholic University of Portugal, the Higher Technical Institute, the Lisbon Higher Institute of Accounting and Administration, and the Public Security Police.



## UBUNTU ACADEMY

The third edition of the UBUNTU Academy continued to operate. This initiative was led by the Padre António Viera Institute and was co-funded by the Porticus Foundation, the Montepio Foundation and Lipor. Partners of the initiative included EVERIS and IADE. Launched in 2010 to undertake informal educational activities aimed at young people with leadership profiles from disadvantaged backgrounds, the UBUNTU Academy aims not only to provide training in leadership so that these young people can be agents of change within their communities but also to develop and strengthen service models benefiting the community and entrepreneurship, drawing on the influence of figures such as Nelson Mandela, Gandhi, Martin Luther King, Aristides Sousa Mendes, Sang Suu Kiy and Desmond Tutu.

In 2015 the Ubuntu Academy III, which was run simultaneously in Lisbon and Porto, held 17 seminars in Lisbon, 15 seminars in Porto and 4 joint seminars in Lisbon and Porto, one of which was residential.

Social projects launched by some of the trainees in 2014, also continued to operate with very positive results. These projects included the Ubuntu Academy of Guinea-Bissau, the *Embarca* project, which took place in the neighbourhood of Navegadores in Oeiras and was funded by the Schools Programme, which promotes educational and social inclusion among children and young people aged between 6 and 24 and also seeks to enhance their future employability; the *Desingosta* project, which is run by four former trainees who now manage four spaces in the working-class neighbourhood of Moinho das Rolas in Oeiras (the spaces in question have been transferred indefinitely by the company Teixeira Duarte for the purposes of carrying out social work among the neediest residents); and also the project *Vidas UBUNTU*, which is run by a former trainee and funded by the Active Citizenship Programme, which has been working with pupils and teachers from 110 schools around the country to promote democratic values through a storytelling methodology.



## PARTIS – ARTISTIC PRACTICES FOR SOCIAL INCLUSION

The third edition of the Academy began with 135 trainees in Lisbon and Porto, 24 voluntary trainers, 30 volunteers in the fields of training for entrepreneurship, 54 students and voluntary teachers who supported specific activities, and 20 social projects which are in development.

The assessment is to be carried out by the Portuguese Catholic University.

PARTIS, which ran for the second time in 2015, is a programme that allows the Gulbenkian Foundation to realize its conviction that art is an agent for inclusion and social change through its unique power to bring people together.

It has been designed to support projects that use artistic practices (music, photography, video, theatre, dance and circus arts) as tools to create bridges between communities that normally do not cross paths, representing an investment of around €1 million over a period of three years.

Where the second edition is concerned, 160 applications were received from all over the country and 16 new projects were selected to receive support over the three-year period between 2016 and 2018.

The projects that made up the first edition, some of which are still underway, completed their second year of existence, having



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## REABILITA+

given rise to 7963 activities and 321 public events (37,636 visitors/public) and reaching around 5791 direct participants. These projects involve 181 full-time professionals, 104 volunteers and 287 (public and private, profit and non-profit) partner organisations.

This project is run by the Just a Change Association, which, with the help of a network of young volunteers, regenerates the houses of very poor families identified by parish councils or social support bodies. The organisations in question subsequently take responsibility for supervising the families, encouraging them to become independent, receive training and become socially integrated.

The funding provided by the Gulbenkian Foundation is intended to consolidate and professionalise this working model so that it becomes self-sustainable.



# ORGANIZATIONS FOR A CONVERGING ECONOMY

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*Strengthening the resilience of social organisations and their ability to get involved through increased efficiency and effectiveness. Forming part of this area are Mobilisation and Streamlining of Resources and the Creation of Strategic Networks and Partnerships.*



# MOBILISATION AND STREAMLINING OF RESOURCES

## SOCIAL INVESTMENT LABORATORY

The Social Investment Laboratory (LIS) is an initiative run by the Calouste Gulbenkian Foundation and by the IES Social Business School in partnership with Social Finance UK. Its main goal is to become a landmark knowledge centre in the field of social investment. It aims to enhance knowledge of innovative mechanisms for funding the not-for-profit sector, to disseminate international best practices in this area and to study whether and how they can be applied in Portugal.

The main problems facing society are the starting point for all the LIS's work: the causes and origins of these problems are extensively analysed in order to identify innovative solutions that help to resolve and prevent them. Financial mechanisms are used as a means to achieve an end: a social sector which has sustainable access to funding sources and makes a greater social impact.



Thus, the Social Investment Lab is divided into three areas:

- **Creating knowledge for the market** by producing research notes on specific areas of social investment and creating content for business schools, specifically through the *SIB Research Programme*, which undertakes viability studies in relation to social impact bonds at a national and international level. The programme, which began in January 2015 and is now in its second year, is aimed at students who wish to develop knowledge in this area. Since its inception, the *SIB Research Programme* has worked with seven university students who have undertaken research projects in the following fields: youth employability, recidivism, the institutionalisation of children and young people, and active ageing. The participants have access to an intensive training plan that includes training in areas such as the financial modelling of social impact bonds, methodologies for analysing data in Access, the development of social business plans, negotiation, and an introduction to the legal framework of the not-for-profit sector.

Taking place over 6 months, the *SIB Research Programme* also aims to transfer management, finance and social-innovation skills to the participants, facilitating their entry into the labour market

- **Promoting market infrastructure** through the creation of the Portuguese Working Group for Social Investment and the provision of technical support to the Social Innovation Portugal Mission Structure.

The Portuguese Working Group is made up of representatives from the public, private and social sectors and is charged by the Calouste Gulbenkian Foundation with reflecting on the subject of social investment in Portugal. The participating members include the Bank of Portugal, the CMVM, Lisbon Town Council, CASES – the António Sérgio Cooperative for the Social Economy, foundations, financial institutions and universities. Its first report was presented in June 2015 at the *Social Innovation World*



*Forum* in Lisbon. This report contains five recommendations for developing the social investment ecosystem in Portugal:

- 1) Strengthening the skills of bodies that form part of the social economy through training programmes;
  - 2) Introducing financial tools suited to the needs of bodies operating in the social economy;
  - 3) Promoting a results-oriented culture within the public social services;
  - 4) Creating a knowledge and resource centre for social investment;
  - 5) Developing an ecosystem of social investment intermediaries.
- **Dynamizing pilot projects** through the structuring of social innovation funding mechanisms such as the first social impact bond (SIB) in Portugal, which served to fund the Junior Code Academy. A social impact bond is a funding mechanism in which a contract is signed between social investors, public bodies and bodies operating in the social economy to achieve

specific social results. Through an SIB, capital is mobilised that is invested in organisations, social entrepreneurs or initiatives proven to have social impact and provide a potential financial return. If the contracted results are achieved, investors are repaid their initial investment. In the specific case of the Junior Code Academy, a substantial part of the amount initially invested by the Calouste Gulbenkian Foundation will be reimbursed by Lisbon Town Council if the goal set for the project – to improve the cognitive skills and academic performance of 65 students from three primary schools in the Lisbon region through the teaching of computer programming (coding) – is achieved. The project therefore aims to fight against the high levels of educational failure and retention and to help develop new learning techniques. The performance of the students will be compared with a control group and measured through an evaluation method that has been scientifically validated by the Universidade Nova de Lisboa.



## MY SOCIAL PROJECT 2.0

This project supports the development of an intelligent platform dedicated to the volunteering of skills. It represents an opportunity for organisations to make their projects viable by becoming more efficient and professional and acquiring greater organisational and management ability. The platform, which is expected to be launched in the first semester of 2016, will allow social projects with specific human-resource needs to be automatically matched with skilled volunteers who are able to meet these needs. It will also be equipped with a project management and reference documentation tool that could provide added value to the process of continuously enhancing the knowledge of platform users, be they organisations or volunteers.

The partners involved, which include the Manuel Violante Foundation, the McKinsey consultancy and the Michael Page human resources consultancy, guarantee the quality of the tools to be developed.

## ZERO DESPERDÍCIO (ZERO WASTE)

The general aim of the Zero Waste Movement is to promote the use of all leftover food products by distributing them to people who lack food under controlled food hygiene and safety conditions, thereby eliminating waste. After the pilot phase was validated in 2014, the initiative was recognised by the FAO as an example of good practice to be replicated globally. In the meantime, the scaling-up phase began with funding provided by the Calouste Gulbenkian Foundation and Lisbon Town Council. Both bodies also participated in this phase of the project.

By December 2015, the Zero Waste Movement had been implemented in seven municipalities and was responsible for distributing over 2,500,000 meals worth over €6 million. Involving 142 donor entities and 56 receiving entities, the initiative reaches 9370 beneficiaries.

# CREATING NETWORKS AND STRATEGIC PARTNERSHIPS

## EUROPEAN PROGRAMME FOR INTEGRATION AND MIGRATION (EPIM)

This programme is an initiative run by 11 European foundations under the umbrella of the Network of European Foundations. It aims to support projects that promote and facilitate the integration of immigrants. Since 2011, the third edition of the EPIM has made it possible to fund several transnational projects involving asylum seekers, refugees, undocumented migrants and migrants in situations of extreme vulnerability as a consequence of the crisis raging across Europe. Numerous activities have been rolled out simultaneously to provide training to immigrant support organisations, covering topics such as: project assessment methodologies; advocacy and lobbying; partnerships, EU-wide networks and collaboration; media and communication, and fundraising.

In 2015, the 10 projects supported by the third phase of EPIM reached completion after giving rise to two new sub-programmes (*the Sub-fund on immigration detention* and *the Sub-fund on reforms of the Common European Asylum System*).

These sub-programmes are serving as pilot projects for the next phase (2016-2018) of this Consortium, which is now in its tenth year. Also in 2015, following concerted action by European Foundations on the occasion of the General Foundations Assembly, preparatory meetings were held for a new sub-fund: *the sub-fund on long-term reception and inclusion of unaccompanied minors seeking protection in the EU*.



## TRANSATLANTIC FORUM ON INCLUSIVE EARLY YEARS (TFIEY)

This forum, which is headed by the King Baudouin Foundation, brings together another 12 European and North American foundations in order to share good practices and recommendations among academics, political decision-makers, members of civil society, and organisations working on the ground in relation to the importance of infant (0-6 years) education in breaking poverty cycles (among the children of immigrants and low-income families) caused by unequal access to education.

In order to make better use of the knowledge and recommendations arising from the TFIEY, a Portuguese working group on infant education for children of immigrants and low-income families was set up. This led to a series of actions taking place between 2013 and 2016.

In 2015, the Calouste Gulbenkian Foundation participated in the organisation of two international meetings of this forum and also held a meeting of TFIEY's Portuguese group.

## TRANSATLANTIC COUNCIL ON MIGRATIONS (TCM)

Led by the *Migration Policy Institute* (USA), the *Transatlantic Council on Migrations* is a pioneering decision-making and advisory body aimed at making a tangible and measurable impact on immigration and integration policy on both sides of the Atlantic. The TCM brings together three key groups: experts/specialists, policymakers and political leaders. Consequently, it produces innovative recommendations based on trustworthy and politically viable sources. The TCM frequently responds to requests from governments and other partners requiring assistance with specific political challenges.

Against this background, the Calouste Gulbenkian Foundation took part in a meeting held in Rome in 2015 on the subject of *Building and Maintaining Trust in the Governance of Migration*.





# KNOWLEDGE AND THE FUTURE

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*Enhancing knowledge of the key factors associated with social problems, the impact that these problems have, possible responses, and the observation of anticipatory signs of social change. This forms part of the action areas Life Transitions, Emerging Social Needs, and Sustainability and New Challenges.*

# LIFE TRANSITIONS

## SHARE – SURVEY OF HEALTH, AGEING AND RETIREMENT IN EUROPE

This Europe-wide project aims to collect and analyse data on the over-50 population with the intention of understanding the ageing process and its effects on individuals in different socio-cultural contexts. The results are consolidated by the European Forum on Research Infrastructures and form the basis of European social-science research.

In Portugal, the project is coordinated by the Institute of Social Sciences of the University of Minho and is co-funded by the Calouste Gulbenkian Foundation and the Portuguese Foundation for Science and Technology.

The data-gathering process in Portugal and the other countries that make up SHARE took place throughout 2015. It is hoped that the data collected will be processed and analysed in 2016.

## DYNAPOR – DYNAMIC MICROSIMULATION MODEL FOR PORTUGAL

This initiative arose from the need to diagnose and evaluate the impact of reforms to the system and to plan new scenarios for social security in Portugal.

Since the project began in late 2013, work has been underway to construct a prototype capable of producing reliable simulations of the number of people drawing old-age pensions up to the year 2060. It is estimated that the prototype will be completed in the first quarter of 2016 and that the project will be completed by the end of that year.

The initiative is the result of a partnership between the Office for Strategy and Planning of the Ministry of Solidarity, Employment and Social Security; the University of Lisbon's Institute of Ageing, which is responsible for running the initiative; and the University of Southampton, which has experience in this area. The Calouste Gulbenkian Foundation took responsibility for purchasing and adapting pre-tested technological infrastructure



that will allow comparative analyses with situations in other countries to be carried out. The Francisco Manuel dos Santos Foundation joined the partnership created for the project and will fund the development model and a study on the financial and social stability of the pension system in Portugal.

# EMERGING SOCIAL NEEDS

## MAPPING INNOVATION AND SOCIAL ENTREPRENEURSHIP IN PORTUGAL (MIES)

### **First phase: North, Centre and Alentejo**

In January 2015, the final results of the first phase of this research project were presented. This initial phase mapped social entrepreneurship initiatives that showed a significant degree of potential in northern and central Portugal and in Alentejo.

In this mapping phase, 134 initiatives were identified which fulfil the criteria that define them as having a significant degree of social-entrepreneurship potential in the three regions: 57 in the Northern region, 48 in the Central region and 29 in the Alentejo region. All the data collected is available at the website of the initiative at [www.mies.pt](http://www.mies.pt).

The Social Entrepreneurship Institute and the Padre António Vieira Institute were responsible for creating MIES.

The Calouste Gulbenkian Foundation, the EDP Foundation and the Competitiveness-Compete Operational Programme funded and participated in the project. Its national partners

are IAPMEI (the Competitiveness and Innovation Agency), I.P., and RHmais, while its international partners are SIX (the Social Innovation Exchange) and the Euclid Network.



## CATALISE

This project aims to identify practical cases which allow innovation and sustainability indicators to be defined and better understood. It is based on initiatives in the regions of Lisbon, Vale do Tejo and Alentejo and complements the activities carried out by MIES. The preliminary results of this project were presented at the Gulbenkian Foundation in November 2015 along with a documentary on the case-studies identified. A public discussion of the results is scheduled to take place in March 2016.

It is conducted by the New University of Lisbon's Sociology Studies Centre (CESNOVA) and SIM – the Climate Change Research Group based at the University of Lisbon's Science Faculty.

# SUSTAINABILITY AND NEW CHALLENGES

## FORUM FOR INTEGRATED GOVERNANCE

The Forum for Integrated Governance (GovInt) is an informal collaborative network of public and private institutions which have agreed to work together to reflect on and take action to solve complex social problems through integrated governance models that provide greater effectiveness and efficiency.

Against this background, several working groups were set up that held meetings to discuss and reflect on seven different areas: vulnerable territories; public administration; children and young people at risk and in danger; GovInt Forum pilot projects (Km<sup>2</sup>, Clip, UDIP/SCML, BipZip); youth unemployment; long-term unemployment; loneliness among the elderly; and homelessness.

In October 2015, GovInt organised an international conference and published the book *Governança Integrada e Administração Pública* (Integrated Governance and Public Administration). National meetings on subjects for which integrated governance is a possible solution were also held.

## STUDY ON FOOD WASTE

In 2010, the Gulbenkian Human Development Programme added food to its agenda, specifically, the areas of wastage and food education. As part of this strategy, the Gulbenkian Foundation signed the Commitment to Prevent Food Waste in conjunction with several public and private bodies with interests in the area.

In 2015, the Higher Institute of Agronomy, with the support of the Gulbenkian Foundation, drew up a preliminary study for monitoring food waste in Portugal in order to enhance knowledge of the status quo in this field.





# PUBLICATIONS AND CONFERENCES

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# PUBLICATIONS



## ART AND COMMUNITY

This book aims to mirror community artistic practices which have the greatest quantitative and qualitative international significance, attempting to fill a gap in the compilation and comparison of diverse experiences that are not recorded, organised and accessible to the general public. Some of the projects on which this book focuses include theatre in the shanty towns of Rio de Janeiro or the occupied territories in Palestine; works created by the choreographer Madalena Victorino or by PELE (a Porto-based structure created in 2007) in specific contexts, such as correctional facilities or working-class neighbourhoods; and a theatre group with deaf participants.



## MANUAL FOR CHANGING THE WORLD – 2<sup>ND</sup> EDITION

This guide was developed by the Social Entrepreneurship Institute. It puts forward a methodology for constructing projects which have social impact, taking overlooked social issues as its starting point. Over the ten chapters that comprise this manual, entrepreneurs are challenged to construct their projects on the basis of criteria such as value proposals, sustainability, the concept of the pilot project and communication. Also included are several examples of successful social entrepreneurship projects and a practical data sheet relating to the project at the end of each chapter.

## MENINOS ESPECIAIS (SPECIAL CHILDREN)

This project supports the publication of the third 'Special Children' collection by the children's library of the Associação Pais em Rede parents network, which supports families whose children have a physical or mental disability. This collection of three books features stories about children with rare illnesses in order to demystify these illnesses by highlighting the points of view of the parents and children who experience them.

# CONFERENCES



## THE ROLE OF THE VOLUNTARY SECTOR IN THE 21<sup>ST</sup> CENTURY

In November, against the backdrop of the Lisbon 2015 European Volunteering Capital initiative, the Calouste Gulbenkian Foundation organised three workshops followed by a European conference at which the current state of the voluntary sector was discussed and considered.

Focused on analysing and understanding the value of volunteering in personal, social and economic terms, the workshops catered to a restricted but very heterogeneous range of working groups made up of people who were interested in, knowledgeable about, or influential in these fields. Together, these participants sought to shed light on concepts, define impact metrics, and arrive at a series of recommendations and conclusions that were subsequently presented at the conference. A short publication that will bring together this information is scheduled to appear in 2016.

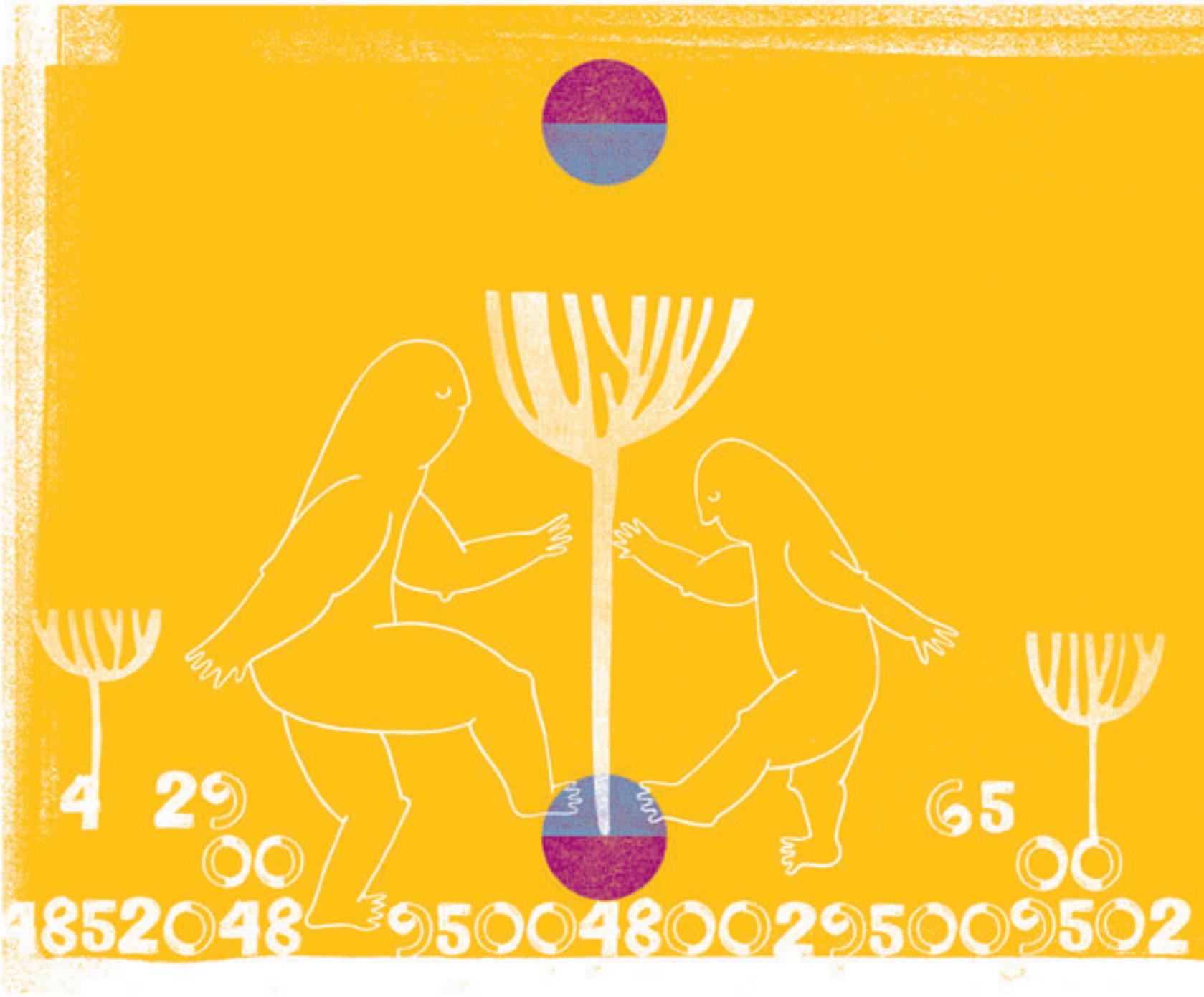


## SOCIAL INNOVATION WORLD FORUM

In partnership with Social Innovation Portugal and the Social Investment Laboratory, the GHDP organised the conference *Social Innovation World Forum: Catalysing Social Investment - an Agenda for 2020*. The conference took place in June.

The aim of this conference was to gain greater understanding of the scope of innovation and social entrepreneurship by showcasing internationally recognised practical cases; to discuss the activities that every sector in society can carry out to promote these areas; and to discuss the role played by public policy in promoting an innovation and social-investment agenda in Portugal and Europe.

The conference programme included international specialists in the field of innovation and social investment, specifically, social innovators who have won international awards, academics, political decision-makers and social investors. Around 500 people attended the conference in person while around 300 people from countries all over the world, including the United Kingdom, Australia and Canada, watched it being streamed online.



# BUDGET IMPLEMENTATION

| AREA  | 2014                  |                   |            | 2015                  |                   |            |
|---|-----------------------|-------------------|------------|-----------------------|-------------------|------------|
|   | No. of grants awarded | Carried out       | %          | No. of grants awarded | Carried out       | %          |
| People in an Inclusive Society                | 54                    | €1.476.417        | 77         | 65                    | €1.229.201        | 64         |
| Social Organizations for a Converging Economy | 11                    | €288.002          | 15         | 10                    | €530.581          | 28         |
| Knowledge and the Future                      | 8                     | €162.135          | 8          | 7                     | €148.799          | 8          |
| <b>SUBTOTAL</b>                               | <b>73</b>             | <b>€1.926.554</b> | <b>100</b> | <b>82</b>             | <b>€1.908.581</b> | <b>100</b> |
| Technical support <sup>1</sup>                | —                     | €90.435           | —          | —                     | €76.367           | —          |
| <b>TOTAL</b>                                  | <b>—</b>              | <b>€2.016.989</b> | <b>—</b>   | <b>—</b>              | <b>€1.984.949</b> | <b>—</b>   |

In 2015, the Culbenkian Human Development Programme invested €1.9 million in projects framed within its three major areas of intervention.

Although this represents a reduction in investment in comparison with the previous year, the area *People in an Inclusive Society* continues to be the most expressive, having consumed 64% of the total investment. The number of grants awarded in this area increased from 54 to 65 grants.

On the other hand, the area of *Organisations for a Converging Economy* showed the greatest development, having used 13% more funds than in 2014, which is explained by the investment made in the social impact bond for the *Junior Code Academy* project. *The Knowledge and the Future* area remained stable at 8% of the total funds awarded by the CHDP.

1. Management, Advisory Board, general expenses

