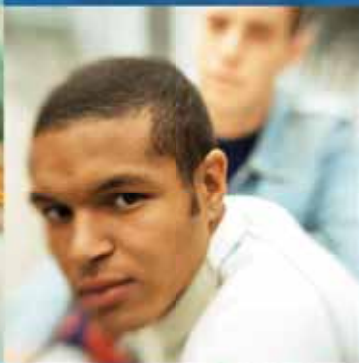


SOCIAL NETWORK

CHALLENGES & EXPERIENCES
OF A STRUCTURAL PROGRAMME



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FROM 2000 TO 2007, the Social Network covered the whole of mainland Portugal, with the exception of one municipality. For a programme of the nature of the Social Network, seven years is a brief period when compared with the demands and challenges posed, which to some extent still exist or have been renewed.

It is fair to say that many of the impacts and results achieved that are mentioned in this document have only been possible thanks to the combined efforts and resources, as well as the commitment, of numerous entities, many experts and directors and various citizens throughout the country.

At this moment in which we present an evaluation of all these years of work, we would like to take this opportunity to show our appreciation to all those who have made the journey with us.

Furthermore, we would like to highlight some of the individuals and entities that, as a result of their constant encouragement, trust and cooperation in implementing the Programme, deserve special mention. To them we wish to express our sincere gratitude:

To **Acácio Catarino**, the Programme's original driving force.

To the **Employment, Training and Social Development Operational Programme** (Programa Operacional Emprego, Formação e Desenvolvimento Social), for its support in the development of the Programme.

To the **Directorate-General for Social Action** (Direcção Geral de Acção Social), for its contribution in planning and preparing the launch of the Programme for the implementation of the Social Network pilot projects and its participation throughout this process.

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To all the **Social Networks, their partner entities and experts**, for their commitment to upholding the principles of the Programme, their collective effort in implementing the working in partnership and the capacity they showed for learning, innovation and intervention.

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And finally to the **Social Network Programme Centre**, to all members who at different times were part of the team, for the responsibility, commitment, resilience and enthusiasm with which they fostered the Programme.

P R E F A C E



FROM A SOCIOLOGICAL POINT OF VIEW, it is more natural for social movements to precede and precipitate the more profound changes in legislation and policy measures that have major effects on society and the real lives of people.

However, the reverse sometimes occurs. An idea or project in the form of a law, policy measure or programme may trigger minor revolutions or accelerate sensitive transformations that take root in the terrain, resulting in changes in culture and mentality and influencing the practice, behaviour and thought of many people.

Such is the case of the Guaranteed Minimum Income, now the Social Insertion Income. Only when, in 1996, the Portuguese Government decided to apply the European Council Recommendation (Recommendation 92/441/EEC of 24 June 1992) – stating that Member States should create minimum income policies – did the idea that support for people in situations of poverty and social exclusion was not a matter of charity but a right become definitive and change the way of thinking about social policies aimed at the most underprivileged.

This is also, of course, the case of the Social Network Programme. But the idea – or rather the series of ideas – contained in the Programme met the expectations of many people, mainly those working in the domain of social assistance, who felt it was necessary to change the forms of intervention. They appropriated the ideas advocated in the Council of Ministers Resolution and the methodological proposals presented, applied them to the launch of the pilot phase and started to champion them and put them into practice.

The Social Network thus became the vehicle for various profound transformations that took place over these last years, even at stages when the Programme's evolution faced deadlocks and a number of adversities, as documented in this short report of the history of the Programme up to the present day.

We need only recall that the Social Network entailed the accountability of local elected representatives, resulting in a profound change in the social intervention of the local authorities over the last decade. This intervention is now carried out systematically in articulation with other public and social solidarity entities.

But perhaps the Social Network's greatest contribution has been the adoption and implementation of an intervention system that sees social problems as multidimensional and situated in specific places, i.e. it sees people in their environment and always sees the development of places in relation to the promotion of wellbeing for all citizens and communities. In this way, it has forged paths for change that we still must follow.

In this new stage of the Programme following the publication of Decree-Law 115/2006, the great challenge facing public and private entities, directors, experts and mere citizens collaborating in local networks is to show that they are capable of providing a better service to citizens, cooperating evermore actively and effectively – in other words systematically strengthening their networking.



HISTORY OF THE SOCIAL NETWORK

FROM IDEAS TO PRACTICE



1.1 THE EVOLUTION OF IDEAS

THE SOCIAL NETWORK CLAIMED to be the most innovative policy with the greatest capacity to produce positive impacts in the panorama of social intervention since the launch of the Guaranteed Minimum Income Pilot Programme in 1996.

Created by Council of Ministers Resolution (CMR) 197/97 of 18 November, the Programme started to be implemented on an experimental basis in early 2000. One of its most important characteristics was great flexibility in the implementation of its aims, methodologies and forms of organisation.

This flexibility, which was commonplace until the publication of Decree-Law 115/2006 of 14 June, which synthesised the national experience of social networks and standardised the networks' organisation and working methods, contributed to the Programme's constant evolution and improvement.

The main idea underpinning the whole of CMR 197/97 is that the responsibility for fighting poverty and social exclusion lies with society and not just with certain entities specifically dedicated to this work. It therefore implies the local mobilisation of all social actors and all citizens.

Based on this central idea, the Resolution proposes the creation of partnerships between local authorities, decentralised public services and not-for-profit private entities created at

parish and municipal levels that would constitute the Social Networks, defined as forums for the articulation and combination of efforts.

In this Resolution we should highlight the importance of local authority involvement, the central role of their chairpersons in fostering this and the proximity to local social problems that the organisational model encouraged through the principle of active subsidiarity, as highly innovative factors which stimulate the evolution of the Network.

Right from the outset, therefore, the Social Network was a springboard for decentralising and recasting the spatial scope for the fight against poverty and social exclusion, and hence for the trend towards greater local government accountability in this area.

Following the publication of the Resolution, a Working Group was set up within the scope of the Cooperation Pact for Solidarity, comprising the Directorate-General for Social Action and the Institute for Social Development (IDS – Instituto para o Desenvolvimento Social), which prepared a framework document for the implementation of the Social Network called the “Programme for the Implementation of Pilot Projects in the Scope of the Social Network”, presented and approved at a meeting of the Cooperation Pact for Solidarity Monitoring Committee on 28 April 1999.

This document defined the selection criteria leading to the choice of the 41 pilot municipalities that took part in the experimental phase of the implementation of the Social Network Programme from January 2000 to March 2001.

The same document, published by the IDS in 1999, is conceptual and programme-orientated and adds a second key idea to the Programme – the need to articulate social development with local development.

This line of thought implies that social intervention, in global terms, is seen from a local development perspective, of which it is an important component as it makes places more

inclusive and combats situations of individual or group exclusion. However, it also assumes the induction of local development in favour of social development - i.e. the point of view that local development must encompass the most underprivileged citizens.

The document highlights two innovative strategic guidelines for the implementation of the Programme, which remain a hallmark of the Social Network.

The first of these is the establishment of a strategic partnership, which should be the only one in each site of intervention. The main characteristics of this partnership are that it is composed of directors of entities belonging to the network, that it is fostered by the local council and chaired by local elected representatives, and that its scope of intervention is transversal in relation to the areas of intervention. This guideline has created the conditions for designing and developing social intervention centred on the existing problems in the site itself.

The second strategic guideline is the promotion of integrated, systematic and compulsorily participatory intervention planning by all local agents. This entails defining intervention priorities, which should be the basis for articulated action by the different partners.

Why did these strategic guidelines related to the Programme's new key idea arise? To try to overcome certain negative constraints and customs identified in the social intervention panorama in Portugal.

During the 1990s, there was a prevailing idea in the social area that, at the same time that partnership dynamics were being consolidated, there were also many good measures and programmes and a major financial investment in combating situations of extreme poverty, in struggling against unemployment and in supporting the most underprivileged or excluded social groups

However, interventions to support specific underprivileged groups or those with less markedly place-based logic continued to be carried out by means of highly-targeted projects

that were not part of a broader plan and were not mutually complementary.

More conventional social intervention took place sectorally in the areas of education, health, employment, housing and social action. The latter was carried out in a more ad hoc fashion, through the support of families and individuals in a situation of poverty. Sectoral interventions tended to be verticalised and bureaucratically implemented.

Why were the results not proportional to the human and economic resources deployed?

In short, there was a failure to make efficient use of and exploit local responses and resources or to articulate the interventions by different partners undertaken in the same terrain. These strategic guidelines, launched within the scope of the Social Network Programme, are aimed at meeting this challenge so that social interventions are developed gradually in partnership, are centred on territories and include all sectoral areas.

1.2 BUILDING THE SOCIAL NETWORK

THE EXPERIMENTAL PHASE (JANUARY 2000 TO APRIL 2001)

The Social Network Pilot Programme started up in early 2000 as an experimental phase in implementing the Social Network in 41 pilot municipalities spread throughout mainland Portugal.

The challenge posed to the 41 municipalities was to establish a new type of partnership, effective and functional, getting local authorities on board, decentralised public services and social solidarity institutions, and to apply strategic planning methodologies capable

of serving as a basis for articulating the activity of all the partners and making best use of their resources.

The direction given to local networks, which we can regard as their mission, was to involve all partners in on-the-ground social intervention in the fight against poverty and social exclusion in a concerted fashion, and to build more inclusive spaces, thereby contributing to local development.

The difficulties in implementing the Social Network pilot projects and meeting the challenges they faced were manifold and not easy to overcome. They included the following:

Firstly, there was no tradition of social intervention planning in Portugal. Existing basic planning was sectoral in nature and there were no forms of strategic planning covering place-based concerns and encompassing their multidimensional nature. Nor were most of those working in social intervention trained for this.

Secondly, with the exception of a few of the country's largest urban municipalities, the local authorities usually confined their involvement in social intervention to social housing, or else there was no intervention at all; many did not even have dedicated staff working in this area. This led some entities to question local authorities' ability to take on the task of fostering the Social Network that had been allocated to them as well as calling attention to the risk of politicising social intervention.

These and other difficulties were discussed at the First National Meeting of the Social Network, on 7 November 2000 in Estoril. One of the main issues raised by workshop participants was the excessive number of partnerships on the ground and resistance to the implementation of the Social Network. This was caused by an organisational culture based on competition as opposed to inter-institutional cooperation and, sometimes, on exclusively highly-targeted assistance-based interventions which predominated among many of the more traditional institutions.

The overall evaluation at the National Meeting was that, despite the difficulties, the implementation of the Social Network was very positive. Some 80% of the pilot municipalities had set up LCSAs and were engaged in producing their Site-specific Social Assessments. Qualitatively speaking, the results achieved in building up partnerships and training agents were outstanding.

Jordi Estivill, who gave the closing address summarising the conclusions of the meeting, considered the Social Network to be a pioneering experience that could be taken up in other European countries. However, he also warned that a programme with the characteristics of the Social Network required greater visibility and strong political support, as the impacts it made were not immediately evident.

The First National Meeting, when the Social Network was only being implemented in 41 municipalities, was attended by 300 participants. This meeting demonstrated the network's strength in mobilisation and the expectations it produced, mainly among the experts on the ground but also among many directors and local authorities that actively participated in the meeting.

The Report on the Execution of the Social Network Pilot Programme, published in November 2001, provided an assessment of the pilot phase and a more rigorous analysis of the Programme's successes and difficulties during that time.

The qualitative evaluation of the Programme's execution in the pilot phase demonstrated the possibility of forging a new type of partner relationship between public and private entities, including intervention in the same terrains. This would be based on equity between the member entities and, as a form of participatory democracy, on agreement regarding the aims and organisation of the actions implemented.

Other positive aspects highlighted were the readiness of most local authorities to promote local projects, contrary to the concerns of the private social solidarity institutions (PPSI)

unions and charitable institutions, the joint production of Site-specific Social Assessments – resulting in a greater understanding of local problems – and the sharing and dissemination of information (contrary to the rigid institutional cultures).

The main constraints on implementing the projects included the difficulty of defining organisational and operational models in the larger municipalities with more member entities, the difficulty in animating the Parish Social Committees and the long and drawn-out planning processes in many pilot municipalities, due to the lack of experience or preparation on behalf of the entities and local experts.

It is important to note that in its concluding summary the 2001 document presented a set of proposals for the future of the Social Network, which included the following:

- Implementing the regulations in CMR 197/97 or creating a new set of regulations including the pilot project experience to replace the Resolution;
- Taking steps to grant the Social Network responsibilities in implementing the National Action Plan for Inclusion (PNAI – Plano Nacional de Acção para a Inclusão);
- Studying the possibility of defining the processes that extend beyond the scope of municipalities that ensure the coherence of different levels - national and local - of planning;
- Defining the conditions and methods for signing programme contracts, as set out in Point 134 of CMR 197/97, ensuring that they are aimed at resolving the most pressing social problems.

By the end of 2001, therefore, the basic strategic guidelines for the evolution of the Social Network had already been defined. Although they were upheld in subsequent years, they were only ratified in 2006 with the passing of Decree-Law 115/06.

THE PERIOD OF PHASED ENLARGEMENT (2001/2006)

Based on the experience gained, the Institute for Social Development (IDS), the Programme's managing body until its abolition in March 2003, took two steps that turned out to be essential for the success of the extension of the Social Networks to the whole of mainland Portugal.

The first step was the phased extension of the Programme to new municipalities, through an enlargement plan allowing for the admission of 50 new municipalities every year.

This avoided the difficulties experienced with the extension of the Guaranteed Minimum Income to the whole country following its pilot year, due to the lack of preparation among many municipalities for its implementation. The conditions were created for new municipalities joining the Programme to be supported in mainland Portugal by the Institute for Social Development – Social Network Centre (NRS – Núcleo da Rede Social).

In view of the innovative nature of the Programme and the heavy demands placed on it by the actions proposed to the municipalities, the IDS undertook, starting in the pilot year, to set up an effective supervisory system in close liaison with the new municipalities, guaranteed by the NRS.

For this purpose the NRS developed an active supervisory and monitoring methodology which emphasised direct support to the new Local Councils for Social Action (LCSAs) and their executive centres, along with the systematic production of support documents, highly practical training directed at achieving the aims defined by the programme and the exchange of experiences among local networks.

The practical implementation of this methodology was basically guided by the incentive to local experimentation, taking into account the flexibility built into the Social Network model and the drive to systematise and disseminate good practices.

This again was a total break with the distanced and reduced forms of support given to any monitoring of projects, highly centred on financial considerations, which was the current practice. However, this type of supervision became difficult in the second year of enlargement and the essential transfer of supervision to the District Centres should have been better prepared and carried out sooner in order for the Social Network Centre to be able to concentrate on supporting the 18 District Centres and for the latter to provide direct support to the local networks.

The lesson to be learned is that programmes in general, and the more innovative ones in particular, need to have effective supervision and monitoring systems set up right from the start. They must be evaluated externally, as in the case of the Social Network, in order to ensure that projects do not deviate from the aims defined at the programme start and to allow for the possible introduction of the necessary remedies in a timely fashion.

The second decision, perhaps decisive for the future of the Programme, was the submission of an application by the IDS to the Social Network for Development Project Typology, as part of Axis 5 of the Third CSF Operational Programme for Employment, Training and Social Development (POEFDS - Programa Operacional para o Emprego, Formação e Desenvolvimento Social). This had the dual aim of supporting municipal councils in the first 24 months of implementing local projects and providing special training for local experts and directors, particularly in the area of strategic planning.

The POEFDS management's approval of the Programme Contract submitted by the IDS for action-type 5.1.1.1 - Fostering and Consolidating Local Partnerships resulted in the latter funding the Social Network's implementation process in the participating municipalities for a 24-month period, which in most cases was extended to 29 months. The amount of funding was modest but sufficient enough to enable the municipal councils to contract a dedicated staff member to work in social services or consultancy services, to provide training for local experts and to disseminate the Programme.

In this phase the municipalities were aided by the Support Programme for the Implementation of the Social Network created by Regulatory Dispatch 8/2002 of 12 February, which defined the conditions for supporting the Social Networks implementation process, particularly with respect to the technical and financial support to be granted to the entities submitting applications and the procedures and obligations to be observed by these entities.

On the other hand, and in addition, the POEFDS manager annually approved a training plan submitted by the IDS within the scope of action-types 5.1.1.1 - Fostering and Consolidating Local Partnerships and 5.1.1.2 - Training and Skill acquisition of Social Development Agents. Approval of this training plan by the POEFDS allowed the programme to implement a number of activities aimed at all Social Networks, e.g., training activities for experts and directors of partner entities; regional and national meetings to disseminate the Programme; awareness-raising on issues relating to social development and dissemination of good practices; production of technical support documents, which proved to be essential instruments in carrying out various Social Network implementation actions; set-up and operation of the Programme's national information system, whose utility is indisputable in terms of the benefits it has brought to all Social Networks.

In this way, many smaller member municipalities with fewer resources whose local authorities were in a phase of providing roads and basic sanitation and did not have any dedicated staff working in social services, had the opportunity to hire a staff member with expertise and start to be active in the field of social intervention.

It is now fair to say that the extension of the Social Network throughout mainland Portugal has been a factor in speeding up the process of engaging local authorities in social intervention – one of the Programme's achievements – by creating the conditions for the transfer, currently under way, of certain social action competencies to the local authorities.

The implementation of the local networks was a process that, naturally, has taken place at varying speeds. It has been easier and more effective to build up local networks in

municipalities with a greater tradition of working in partnership and project intervention, but more difficult and slow-going in municipalities with little experience of working in partnership and scant social intervention.

The main difficulty, as with the pilot phase, continued to be the production of planning instruments. Many LCSAs took the two years of implementation in order to produce Site-specific Social Assessments. Others produced Social Development Plans that were too extensive and read more as lists of municipal needs than feasible intervention plans designed on the basis of well-defined priorities.

During the period of extending the Social Network it became increasingly clear that it was essential to simplify the processes for producing Site-specific Social Assessments without undermining their quality, while ensuring the full participation of the partners. At the same time, there was a need to develop pragmatic, realistic action plans centred on hubs of intervention and resulting from the priorities defined.

EVALUATION OF THE IMPLEMENTATION OF THE NETWORKS AND EMERGENCE OF NEW ISSUES

The evaluation of the process of implementing the Social Network was carried out at two events which together permitted the Network's agents to reflect – the Second National Meeting in 2003 and the 2004 Regional Meetings – as well as at the Inter-LCSA meetings, which have become common practice, and in the 2005 external evaluation of the Programme.

The Second National Meeting of the Social Network, held at the Aveiro Conference Centre on 21 November 2003, was another important occasion for mobilising the Social Network's agents countrywide and boosting the Programme. It was attended by 670 participants, at a time when the Network already included 175 municipalities across mainland Portugal.

The panel-based discussion focused on the expectations brought about by the Programme, network operations and planning processes. Several examples of good practices were presented with regard to each of these items.

The meeting was organised into thematic panels, including expert commentators on the areas in question. The morning panel discussed experiences relative to “Motivations and Expectations Regarding the Programme”. During the afternoon there was a presentation of two experiences of the “Production of Site-specific Social Assessments and Social Development Plans”.

In his concluding remarks, guest commentator on the first panel, António Batista¹, drew attention to some of the impacts the Programme was having, but also to the difficulties encountered which had been well reflected in the experiences presented. He pointed to three key issues the Network raised with regard to the logic of social intervention at the national and local levels.

The first of these concerned the Network’s focus on the community – i.e. the concern with eliciting, structuring and organising the voice of local communities. He mentioned the difficulty of this process in rural areas, where traditionally these voices were mere whispers and were not organised or accustomed to expressing themselves, making it difficult to implement the Parish Social Committees in these places.

The second issue was that the Network forced organisations to think, to come out of their sandboxes, to think of themselves as belonging to something bigger than themselves and to re-think their mission, which is to provide an organised response to the needs of the community. This meant that the Network was inviting organisations to understand one another, to learn to negotiate and build bridges, to adopt common language and finally to start up the very difficult but nonetheless essential process of transforming the established organisational cultures.

¹ The planning and evaluation consultant who monitored various local networks throughout the country.

The third issue, relating to the fact that the Network was involved in the emergence of local policies designed and developed with local resources, was approached in a similar manner by Ana Cardoso², the commentator on the second panel who pointed out that the Social Network incentivised place-based action and the integration of responses so as to respond better to citizens' problems.

This commentator also emphasised how, as the construction of the local Networks progressed, the dichotomy between the economic and the social grew increasingly blurred, so that the need for the presence of economic partners in local networks was evermore evident.

This meeting reaffirmed the need for convergence among the PNAI and the Social Network. It was confirmed that in the future there would be an external evaluation of the Programme as well as, in light of the vital importance of one of the Network's outputs, the Information System³.

The Second Meeting, held after a significant number of municipal councils had completed the participatory planning processes, included on its agenda the issue of practice – i.e. recalling that the networks were not just planning instruments but also structural elements of local social intervention at the service of local communities in order to better meet their needs.

The first Regional Meetings of the Social Network, under the general theme “Local Development – What Challenges?”, took place in November and December 2004. Organised by the Social Security Institute (ISS – Instituto da Segurança Social) and the Portuguese Association for Local Development (ANIMAR – Associação Portuguesa para o Desenvolvimento Local), the four meetings were held in Gouveia, Beja, Vialonga and Macedo de Cavaleiros. They were attended by over 600 local network experts and directors.

² A researcher from the Social Research Study Centre (CEIS) who monitored the various networks in the districts of Oporto and Lisbon.

³ The Information System, here only mentioned in passing, will be discussed in more detail in the chapter dedicated to the Social Network's main outputs.

Highly participatory, these meetings were aimed at promoting reflection/information on the Social Network, exchanging experiences between municipalities and disseminating good practices. They resulted in important conclusions and the definition of future lines of action for the work of the Social Networks.

Over 600 local social network experts and directors attended the thematic workshops on: 1) Sustainability of the Social Network; 2) The Social Network's Information Systems and Marketing; 3) Promotion of Efficient and Effective Networks and Partnerships in Local Social Development; 4) Articulation between the Economy, Place-based Specificities and Solidarity; and 5) the Social Network's Contributions to the Improvement of Citizens' Quality of Life.

Suggestions for guaranteeing the sustainability of the Social Network included the need for inter-ministerial articulation and a new regulatory framework reflecting local experience.

Other noteworthy points are the importance of articulation between the various policy measures and national programmes and between the various sectors (e.g., inclusion, health, education and housing), and the need to guarantee the funding of the Social Development Plans' (SDPs) priority actions.

One issue considered essential to affirm the role of the local networks is that it should be compulsory to take into account the opinions of the local networks on applications, as a follow-up to the drive towards integrated participatory planning.

In terms of organisation, it was stressed that in order for partnerships to operate effectively and efficiently it was important for local authorities and the directors of the different entities to become more engaged and for private entities to participate.

It was also pointed out that there was a need to use social marketing strategies to systematically highlight the results achieved in the development of local network interventions. The

publication of municipal resource handbooks was seen as a good practice that has started to spread.

With regard to specific social intervention, the importance of local networks responding systematically to citizens' needs was emphasised. There was a need to re-invent the forms of social intervention, for example by developing integrated responses, creating new organisational models in departments in various forms and giving more autonomy to the action of experts.

Regarding the Social Networks' contribution to improving citizens' quality of life, the need was stressed for public and private entities to move towards contracted forms of intervention and to implement integrated projects in priority areas. The importance of involving local populations was also emphasised.

Regional meetings, such as the Second National Meeting, have revealed an emerging awareness that the Social Network can only contribute effectively to local development to the extent that it can be a driver for changing the ways of intervening in the social realm.

The development of the Social Network has accompanied and driven the affirmation of ideas such as the importance of place-based intervention and concrete proposals such as the contracting of local interventions and the above-mentioned integrated responses.

The prospect of fostering place-based intervention led the Social Network to promote the "Typification of situations of exclusion in mainland Portugal" study, published in 2005, aimed at developing the place-based awareness of situations of poverty and exclusion and, from a national standpoint, at promoting an understanding of the type of spaces in which priority interventions should be launched.

This study proved essential for the recent launch of the Social Development Local Contracts as a model of integrated multi-sectoral projects, based on contracting between local entities

and benefiting from centrally-induced funding, implemented in articulation with the local Social Networks.

The idea of proceeding with Local Development Contracts within the Social Network's scope of activity came from the Social Network Centre, which promoted discussion on this subject with academics and experts experienced in project work, and produced the subsequent proposal for their implementation in November 2002.

The intention was to replace the more conventional intervention models, often taking the form of social support projects of limited duration and means, with place-based interventions aimed at promoting local development.

EXTERNAL EVALUATION OF THE PROGRAMME

The external evaluation of the Social Network, carried out by the Spatial Studies Centre (CET – Centro de Estudos Territoriais) during 2005, independently and critically verified the Programme's aims and trajectory. It pointed out some of the most important contributions that emerged in the framework of the Social Network and underlined its impacts at different levels in the broader panorama of social intervention.

The evaluation report provides a good description of the range and potential of the Social Network when it mentions that by combining the fight against poverty and exclusion – an aim shared by many other programmes – with the promotion of local social development, the Programme stands apart from other programmes with its different scope and innovation. The Network is also distinguished from “a conception of social policy focused on the simple activation of redistribution measures, by proposing an alternative systematic and integrated approach to social development and the promotion of social wellbeing”⁴.

⁴ Evaluation of the Social Network Programme – Summary Report, p. 8.

Among the other difficulties the document mentions are a number of shortcomings as regards support and technical supervision, resulting in a degree of insecurity among local teams. This has been due to the insufficient reinforcement of the Social Network Centre and to the fact that attempts to implement the use of video-conferencing were unsuccessful.

The evaluation report identifies the Programme's main factors of vulnerability as: "the allocation of responsibility for the Programme's management to a specific Ministry, and above all the lack of formal and publicly visible inter-ministerial articulation", because "this sent an (incorrect) signal to those on the ground that it was an initiative restricted to 'social action' – i.e. a signal entirely contrary to what the Social Network was trying to induce: that of the need for integrated social policies".

Another vulnerability factor mentioned is the absence of regulations for the Council of Ministers Resolution (CMR) that gave rise to the Programme. This might have been interpreted as a sign that the Social Network was not a programme highly valued by the political authorities.

In fact, the absence of regulations for the CMR over nine years is something that cannot be disguised. In our opinion, it means there has been insufficient support for the Programme and it reflects the difficulty in understanding the reach and importance of a programme which, being structural, does not have immediate visible impacts. Instead, it produces long-term results, mainly in the form of designing and organising place-based social intervention and in promoting innovative social responses.

The Social Network is in fact a unique programme, as it was created top-down – i.e. it was generated by a Council of Ministers Resolution. It has therefore been the object of some critique and misperception. It has forged its own way and been set up from bottom-up because it met the needs felt by many on-the-ground experts and directors who championed the Programme and committed themselves to promoting local social networks. The report's strategic recommendations reiterate the main basic proposals presented at the national and

regional meetings and in the Pilot Programme Execution Report – i.e. the need for a new set of regulations, articulation between the Social Network and the PNAI, compulsory consideration of the Social Network's statements on public funding and the creation of supra-municipal Social Network structures, which were finally incorporated into Decree-Law 115/2006 of 14 June.

In 2006, with the publication of the new Social Network Decree-Law that incorporates the experience accumulated by the local networks over the years, and with the two largest municipalities in the country (Lisbon and Oporto) joining, posing new demands and challenges, the Social Network Programme definitively entered a second stage in its life.

This was recognised at the Social Network's Third National Meeting, held under the aegis of "Consolidating Participating Developing" in Santarém in 2006. The main aims of this meeting were to evaluate the role of the local social networks as prime structures for implementing and providing information about the PNAI and disseminating the new Social Network regulations from Decree-Law 115/2006 of 14 June.

Besides the experts and different partners responsible for the activities of the local networks, the meeting was also attended by various guests and representatives of the three main basic

sectors of the Social Network model: the State, local authorities and solidarity institutions.

The essential role of each of these was recognised by the Minister of Labour and Social Security, who stated that “the Social Network is a process of articulation between the resources and action of these three institutions that are essential for an effective policy for promoting social cohesion”.

The Social Network was also considered to be a vital structure for the design and implementation of the PNAI in local areas. The principles of the two mechanisms were reiterated and the various reasons for convergence between the two were noted.

Another commitment is to set up a global information system with a local dimension and another with a national one, which would lead, in the long term, to a system for ascertaining the social reality of poverty and social exclusion factors, based on common indicators.

This meeting was intended to mark a turning-point, an extension and consolidation of social policies, where the main challenge was to show that the Social Network can actually be an important asset to help provide a response to the social problems faced by the most vulnerable citizens and communities.

CHAPTER 2

MAIN RESULTS & IMPACTS OF THE SOCIAL NETWORK

2.1 THE SOCIAL NETWORK: A UNIQUE PARTNERSHIP

In the context of the Social Network Programme, partnership is certainly a key issue, as it is one of the building blocks of networking. The two concepts appear to be so interrelated that they blend into one: there is no network without working in partnerships.

We recall that the Council of Ministers Resolution 197/97 rightly recognised the existence in Portugal of “countless social action groups and initiatives”, many of them pioneers of this methodology. It urged “the whole of Portuguese society, especially entities working in this area, to intensify and concert their efforts in order to optimise their modes of action”.

Being both a means and an end, one of the Social Network Programme’s strategic aims is precisely “to develop an effective and dynamic partnership that articulates the social intervention of the various local agents”.

Partnership was understood here as a “cooperative and negotiated dynamic of operation and intervention between public and private entities and other local actors, aimed at boosting local development. This *modus operandi* results in a participatory rationalisation of the action, reducing costs and risks and promoting the exchange of experiences, knowledge and know-how. Decision-making becomes a collective commitment” ¹.

We may question the extent to which this aim has been achieved six years after the

¹ Social Network Centre (2001) Social Network Programme. Lisbon: IDS., 43 pages, p. 42.

implementation of the Programme.

On the basis of some of the Programme's execution data it can be seen that the number of partner entities in the networks, or rather of those that have applied to join the structures of the Social Network, is quite high.

Table I - Number of partner entities in LCSAs by region

| Region | Number of partner entities in LCSAs |
|-----------------------|-------------------------------------|
| Norte | 3495 |
| Centro | 2767 |
| Lisboa & Vale do Tejo | 1919 |
| Alentejo | 1327 |
| Algarve | 558 |
| Total | 10066 |

Source: ISS, I.P. – “Final Execution Report on the Support Programme for the Implementation of the Social Network” (December 2007).

However, this purely quantitative observation (like the geographical scope) is not enough in itself to explain the particular characteristics of the processes of implementing the Social Network or the local dynamics, the wide variety of the conditions for the democratic exercise and extension of citizenship, the methods of diagnosing and responding to social problems – and therefore the development levels of working in partnerships. Obviously this type of study can only be produced by analysing each LCSA.

Indeed, the contact and technical supervision provided to the LCSAs during these years shows that “partnerships” function in highly variable ways. It affects, for example, the partners' meetings, the development, extension, evaluation and updating of planning instruments, the production of projects and/or applications, the issue of statements, the contracting and implementation of actions on the ground and the very sustainability of the networking.

We also see that the actors involved in these processes tend to evaluate the partnership in different ways, depending on whether it is a matter of work carried out by executive centres, working groups or LCSA plenaries, which sometimes results in distinct ways of functioning.

All these aspects severely limit the activity and results achieved by the LCSAs. It is fair to say that in Portugal there is not so much one social network but various social networks.

Starting from the principle that a network only develops to the extent that its members wish it to, it can also be assumed that the effects of the Programme depended on how much and how well the principles and aims (and also the resources provided) were taken on board by the local agents – i.e. to what extent they favoured and corresponded to their original conditions and expectations. In these cases the Social Network Programme went beyond the start-up phase and the project was taken over locally by a collective.

Despite all these victories, the Social Network, as a good example of harmonisation and working in partnership, remains a “challenge”. If we want to take full advantage of this methodology we must (without ignoring its various forms on the ground, where many misgivings and difficulties regarding its functioning persist) highlight and insist on its potential.

A very frequent source of unease, particularly among professionals working in the area, is that they cannot achieve an “ideal” functioning of the partnership in the way it is conceived. We sometimes run the risk of this feeling becoming paralysing.

We therefore consider that one of the first challenges is to accept that the partnership will not always function constantly or totally, free of any obstacles and conflicts, and at the same time to make sure that it is still active. In the words of Valarelli, what determines the partnership is not its legal or formal character; rather it is the quality of the relationship that distinguishes it.

In a situation where many entities act and lead at various levels, and it is agreed that they are all important, their management cannot always be based on all the actors having the same assumptions. It is therefore not easy to implement.

The Social Network must therefore be seen as a school in the exercise of democracy between various public and private social agents belonging to the same area. Decree-Law 115/2006 of 14 June calls not only upon the obligatory members to intervene in the partnership but also other entities and people whose important potential contributions enable them to participate in the Local Councils for Social Action.

The assumption that the responsibility for presiding over the network's operating structures, LCSAs and Parish/Inter-Parish Social Committees (PSC/IPSC), lies primarily with the elected members of the local authorities – in this case, respectively, mayors or councillors with sub-delegated responsibilities and chairs of parish councils – is based on a system of legitimacy and functional operability regarding the social development of a particular area. It must not be confused with an intention to include the LCSAs or PSC/IPSC as local authority “bodies” governed by rules of partisan trust.

The Social Network is a forum of political but non-partisan partnerships. Everyone's position must be respected regardless of the majority-elected party strength in each local authority executive. The political and civic nature of the LCSAs' intervention takes the form, among others, of participating in actions that contribute to undertaking national plans and of their privileged position of being able to evaluate and respond to new needs at the central level.

In our opinion there is a growing need for local entities to overcome exclusivism and subordination and start to pay more attention to the opportunities presented by partnerships: complementarity, efficient use of resources, extension of intervention, etc.

To bring this to fruition it is necessary, according to some authors², to distinguish the *doing with* (collaborating) from the *doing together* (cooperating). Collaborating refers to the notion of working with other partners, while cooperating leads to a joint action, which implies not only co-accountability but also a co-decision.

Working in partnerships is still today a major challenge: *so highly valued and, at the same time, so difficult to build...*³

Despite all the difficulties and problems faced in building local networks, and the different speeds at which this work has been progressing in the various municipalities, we consider that, in general, the Social Network Programme, like the EQUAL Programme, has contributed to a significant positive evolution of working in partnerships in Portugal.

In fact, both the Social Network and EQUAL have introduced elements of working in partnerships that were not always present in the more traditional models, namely the existence of operational rules (the Internal Regulations in the case of the Network), compulsory action planning, the view that partnerships should have a decision-making capacity and the proposal that all partners are allocated tasks to fulfil.

In this way they have helped to accelerate the “professionalisation” of working in partnerships – i.e. they have promoted the idea that partnerships are formed in order to do things. Hence their functioning results from negotiation guided by rules, their action results from planning and they must be composed of directors or experts able to make decisions so that their aims may be achieved.

In managing to attract almost ten thousand partners with very different origins and legal status to participate in the local networks, the Programme has shown a remarkable capacity

² “Travailler en Réseau – analyse de l’activité dans les domaines du social, de la santé et de la petite enfance”, Institut d’Études Sociales - Collection du Centre de Recherche Sociale. Geneva: IES Éditions, 223 pp.

³ L. Lamas Valarelli (2007) “Parcerias – noções gerais”, available from: <http://www.rits.org.br>; Cármen Barreira (2007) “Uma questão para pensar: parcerias e alianças estratégicas”, available from <http://www.rits.org.br>

for mobilisation. It must surely have influenced this diversity of entities – obviously to highly varied degrees and with very different impacts – with the spirit and the working principles of the Social Network, thereby helping to speed up changes in their respective institutional cultures.

2.2 STRATEGIC PLANNING

The introduction of strategic planning as a functional method of the Social Network has been one of its hallmarks since it was implemented in 2000. The coverage of municipalities and the proposed national expansion was an innovation in the social action work that had so far been developed.

The introduction of strategic planning methodologies was intended to create conditions for overcoming the risks inherent in the persistence of a sectoralised social policy and in the restraints on local interventions. It resulted in significant changes in social intervention practice. As well as constituting an innovation in this area, strategic planning in local networks was intended to act as a place-based incentivising mechanism, stimulating the design and undertaking of actions defined in partnership and improving the productivity of local resources and responses.

The planning would thus involve the participation of the representatives of the various local institutions, promoting decision-making based on the widest possible consensus on the aims, strategies and results capable of being achieved through instruments produced and validated by the set of partners.

In this way the Social Network would be able to help make the complementarity of the various policy measures effective and integrate different local partners' actions and projects into one concerted and coherent local development action.

However, the reach of this decision also encompassed another aim which has not yet been possible to achieve. The introduction of intersectoral planning with regard to a set spatial domain is, in our view, an essential condition for the practice of something much talked about yet about which little done – namely creating conditions for a preventive intervention that can take on more importance in comparison with the merely palliative intervention which remains predominant.

Being a continuous and flexible process that can absorb the changes occurring within a spatial domain, planning should be carried out by a partnership committed to managing the areas' interests and needs and to drawing up strategies that benefit all stakeholders.

As an active, multidisciplinary partnership, the LCSA would unite suitable bodies to implement these processes and to produce the planning instruments provided for in the Programme (Pre-assessments, Site-specific Social Assessments, Social Development Plans and Action Plans) as well as to implement the projects, actions and activities included in them.

It was known at the outset that this was not – and is not – an easy task. The lack of experience in applying the planning methodologies and the factors inherent in the concept of strategic planning make it a complex job.

Strategic planning is a management methodology comprising intervention, or the execution of projects and actions defined in partnership. Why call strategic planning a management methodology? Because the planning is a continuous and flexible process susceptible to the changes occurring in the spatial domain and monitored by an active, multidisciplinary partnership in which interests and needs are tacitly managed for the municipality and strategies are drawn up that benefit the stakeholders.

Planning itself is a process of negotiation and concertation between representatives of various institutions based on decision-making, with the aim of achieving a broad consensus

on what aims, strategies and results are achievable within the scope of the SDP, which is not always peaceful or easy.

Strategic planning is based on two pillar notions – space and time. If we see the function of planning as a logical and coherent sequence between various stages, we are faced with the constant conflict between space, as a specific area, and a time that tells us by when we want to achieve a particular aim.

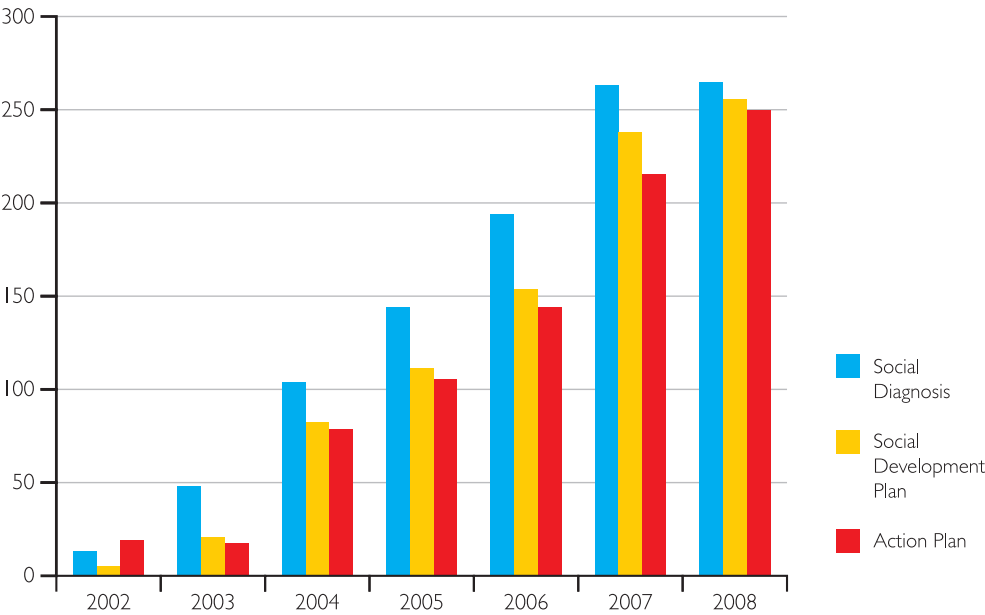
Each spatial domain's planning instruments are the result of these interactions in specific social contexts and reflect a wide variety of dynamics, competencies, available resources, issues, strengths, opportunities, threats, etc.

In short, the introduction of strategic planning is a process of learning not just to better implement the methodologies selected and to be increasingly better able to manage the notions of time and space – avoiding, for example, the design of unachievable plans – but also of learning how to negotiate and concert the interests of the different stakeholders.

It is therefore no surprise that municipalities are in highly varied stages of assimilating and implementing the forms of participatory strategic planning.

Chart 1 shows the evolution in the number of planning instruments produced by the LCSAs from the launch of the Programme until December 2008. Table 2 shows these same planning instruments by district.

Chart 1 - Planning instruments produced by the LCSAs by year (accumulated data)



Source : ISS , I.P. / DDS / UQF T- Social Network Sector (December 20 08)

Table 2 – Planning instruments produced by the LCSAs within the scope of the Support Programme for the Implementation of the Social Network by district

| LCSAs/Planning instruments produced | Total | Aveiro | Beja | Braga | Bragança | C. Branco | Coimbra | Évora |
|---------------------------------------------------|-------|--------|------|-------|----------|-----------|---------|-------|
| No. of councils | 278 | 19 | 14 | 14 | 12 | 11 | 17 | 14 |
| No. of councils belonging to the Programme | 278 | 19 | 14 | 14 | 12 | 11 | 17 | 14 |
| No. of LCSAs established | 278 | 19 | 14 | 14 | 12 | 11 | 17 | 14 |
| No. of Site-specific Social Assessments | 269 | 19 | 14 | 14 | 10 | 11 | 17 | 13 |
| No. of Social Development Plans | 260 | 19 | 14 | 14 | 9 | 10 | 17 | 12 |
| No. of Action Plans | 253 | 19 | 14 | 14 | 9 | 10 | 17 | 12 |
| No. of planning instruments produced and approved | 782 | 57 | 42 | 42 | 28 | 31 | 51 | 37 |
| No. of planning instruments envisaged | 834 | 57 | 42 | 42 | 36 | 33 | 51 | 42 |

Source: ISS, I.P. / DDS / UQF T- Social Network Sector (December 2008)

In conclusion, strategic planning is a form of intervention management that makes it possible to revitalise existing resources and optimise the partners' competencies in order to generate local social development in which we continue to learn and through which we all stand to gain.

We would like to underscore, however, that, whatever the future of the Social Network, there are irreversible gains from the process now under way.

The first of these is skill acquisition by numerous experts and directors who have attended

| Faro | Guarda | Leiria | Lisboa | Portalegre | Porto | Santarém | Setúbal | V. Castelo | V. Real | Viseu |
|------|--------|--------|--------|------------|-------|----------|---------|------------|---------|-------|
| 16 | 14 | 16 | 16 | 15 | 18 | 21 | 13 | 10 | 14 | 24 |
| 16 | 14 | 16 | 16 | 15 | 18 | 21 | 13 | 10 | 14 | 24 |
| 16 | 14 | 16 | 16 | 15 | 18 | 21 | 13 | 10 | 14 | 24 |
| 16 | 14 | 16 | 15 | 15 | 17 | 19 | 13 | 10 | 13 | 23 |
| 14 | 14 | 14 | 15 | 15 | 17 | 18 | 13 | 10 | 12 | 23 |
| 13 | 13 | 14 | 16 | 15 | 17 | 17 | 11 | 10 | 10 | 22 |
| 43 | 41 | 44 | 46 | 45 | 51 | 54 | 37 | 30 | 35 | 68 |
| 48 | 42 | 48 | 48 | 45 | 54 | 63 | 39 | 30 | 42 | 72 |

strategic planning training actions or who, even if they have not attended them, have participated actively in planning processes in their municipalities or parishes and have thus acquired new competencies.

The other advance is that various generations of experts and directors who have participated in the implementation of the Social Network have learned to adopt a global view of place-based problems rather than see them as discrete sectoral phenomena. They have also learned to understand the importance of integrated multidisciplinary interventions and of networking.

2.3 CONTRIBUTIONS TO THE TRAINING/SKILL ACQUISITION OF SOCIAL DEVELOPMENT AGENTS

From the start of the Social Network Programme (1999), the Social Network Centre has been concerned with organising training actions, Inter-LCSA thematic sessions and national and regional meetings directed at the experts responsible for fostering and implementing the Programme, as well as at directors and other partners.

All actions arose out of the aims of the Social Network, the results shown by the LCSAs and the training needs of the partner organisations' experts, identified in the technical supervision carried out by the Social Network Centre and in the evaluation of the training actions that took place in previous years.

TRAINING ACTIONS

Since this is a programme using strategic planning methodologies, it was considered essential to provide the intervening agents with special tools and language in order to facilitate the participatory construction of the instruments needed for the concerted planning of place-based intervention actions.

With the indispensable assistance of the Competencies for Training Centre (Centro de Competências para a Formação, formerly PROFISS), a survey of training needs was carried out and a programme was designed whose contents met the needs identified in the survey. In 1999-2000 the first “**Social Planning and Strategic Spatial Planning**” course was held, aimed at meeting the expectations expressed. These included the acquisition of new competencies and knowledge resulting in improved professional performance, especially with regard to the building of effective planning instruments in the area of social intervention,

fostering the effective participation and engagement of the partners and familiarity with the Programme's essential legislation, principles, aims and methodologies.

In 2001-2002, in order to overcome certain constraints associated with the dominant organisational culture, a special training action was organised, in articulation with the European Anti-Poverty Network (EAPN), for local directors and elected representatives known as “**Development and Social Solidarity Agents**”. The purpose of this training action was to develop a set of knowledge, capacities and approaches in the following areas: social, cultural and economic aspects of Poverty and Social Exclusion; possibilities of network intervention; intervention aims and opportunities; planning, execution and evaluation of the Social Network Programme; institutional management models; methods of organisation and dissemination of information.

It became clear, however, that despite the staged scheduling of the various modules for the convenience of the target audience, it was critical to involve the actual recipients of the training action.

In 2001, in view of the increasing importance of working in partnership in the context of the social policies implemented, a number of training actions were carried out on the subject of “**Coordination and Vitalisation of Partnerships**”. These were directed at experts with responsibilities for coordination in the Social Network's Local Councils for Social Action, the Guaranteed Minimum Income Local Monitoring Committees and the Children's and Youth Protection Committees.

The purpose of this training action was to provide the experts with a frame of reference for the use of techniques in planning and activity management, negotiation, emotional control and ensuring active participation in meetings. This was essential for establishing consensuses that made it possible to effectively overcome the difficulties encountered.

As the social networks constructed the planning instruments, it became clear that the contents of the “**Social Planning and Strategic Spatial Planning**” training action

programme needed to respond to three distinct but sequential levels. From 2003 onwards, the experts involved in the local Social Network were invited to participate in Level 2 and 3 actions, in order to develop and improve their knowledge of certain methodological instruments in the areas of assessment and planning.

Level 1 focused on assessment methodologies applied to a spatial unit; the production of the Work Plan; the distinction between strategic aims and operational aims; definition of intervention priorities. **Level 2** was intended to expand on the Level 1 training action, dealing with the advantages of joint strategic planning processes for municipal development; the construction of the system framework matrix applied to a spatial unit, overall and specific aims, indicators and results; the distinction between strategic and operational levels; project methodology and construction of development plans and respective action plan.

Finally, in the **Level 3** action the project and evaluation methodology areas were selected, as part of the continuous process of strategic planning. There was an emphasis on partnership, seen as a facilitator of the design and execution of joint projects, with an ability to rationalise and make effective use of local resources; the use of project methodology and construction of social intervention projects; and the design and implementation of evaluation and monitoring processes.

In 2007, with the collaboration of a National Administration Institute (INA – Instituto Nacional da Administração) team, a special training action on “**Project Management**” was drawn up, with the purpose of providing knowledge, methodologies and tools to the experts responsible for managing projects. The general aims were to identify the factors that influence a project; to define, plan and control the scope of a project; to manage the critical variables, such as timeframes and costs, impacts and quality of projects; and to recognise the importance of organisation and teamwork.

All these Training Actions emphasised an active methodology, ensuring a balance between the theoretical and practical components. The trainees’ concrete experiences were focused

on with a case-study approach, making it possible to deal with the programme contents in a structured, systematised fashion.

INTER-LCSA AND SOCIAL NETWORK NATIONAL MEETINGS

Since the start of the Programme there has been a biannual working event known as the **Inter-LCSA Thematic Sessions**. This event has the general aim of exchanging experiences, discussing and reflecting on specific issues and learning about and disseminating good practices. The session contents have always been defined in accordance with the aims of the Social Network, the results produced by the LCSAs and the needs identified both in the technical supervision carried out by the central team and in the evaluation of actions implemented in previous years.

In all the series it has always been a concern to take stock of the implementation of the Social Network in the municipalities and to clarify the LCSAs' executive and plenary centres' specific work issues. The second focus, depending on the specific needs identified, deals with important issues such as: the presentation/discussion of good practices in the implementation of the Social Network, based on the ACRS study, "Successful practices in the context of the Social Network"; the presentation of the "Typification of situations of exclusion in mainland Portugal" study; the presentation of the External Evaluation of the Social Network Programme executive summary; the exhibition of the Learning and Resources Centre on Social Inclusion (CIARIS - Centro Informático de Aprendizagem e de Recursos para a Inclusão Social) site's potential; the Social Network Information System; Decree-Law 115/2006 of 14 June; the adaptation of the internal regulations in light of Decree-Law 115/2006 of 14 June; the presentation of Database – Identification and Description of the LCSAs and Introduction/Updating of the Planning Instruments (data relating to the Site-specific Social Assessments, Social Development Plans and Action Plans), among others.

The training actions were led by a group of outside trainers with recognised theoretical competencies and extensive on-the-ground experience. This proved very useful for the trainees, as it made it easier to move from the abstract to the practical. The Inter-LCSA thematic sessions were mostly organised by Social Network Centre experts, with two exceptions, one of which was fostered by the PNAI team and the other by the coordinator of the CIARIS - Portugal agency.

It is worth noting that whenever possible the training actions and Inter-LCSA thematic sessions took place in accordance with the location of the municipalities that held them. This was only possible through close collaboration between the District Centres, municipal councils and other partner entities.

NATIONAL AND REGIONAL MEETINGS

The Social Network held regional meetings in 2000, 2003 and 2006. These were always well attended by local network actors, and in the second half of 2004, to vary the format of the national meeting, there were four Social Network Regional Meetings.

The aim of all these meetings was to promote extensive reflection and information exchange regarding the processes for implementing the Social Network, exchange of experiences between municipalities and knowledge of good practices in the scope of local development. In our opinion, these occasions also contributed to the personal enrichment and development of those who participated.

We believe that this varied series of training initiatives, in the more limited and (in the case of the national and regional meetings) broader sense, held over a period of years in a decentralised fashion covering the whole of mainland Portugal, had a significant impact on the skill acquisition of many experts and, on a lesser scale, of directors. The

Programme's external evaluation mentions this: *"it is important to note that, up to now, the local implementation of the Social Network has already contributed to the training and skill acquisition of a large number of experts involved in local development processes within the scope of the Social Network"*.

2.4 SOCIAL NETWORK INFORMATION SYSTEM

The trend towards the decentralisation of information represents wider access and the development of a society more aware of its duties and demanding of its rights. The effects of this are beneficial both quantitatively, significantly increasing the number of informed individuals, and qualitatively, by helping to build a more participatory and knowledgeable society in which information and its dissemination are a basic condition for building democratic decision-making processes.

Since the Vision of the ISS, I.P., is to guarantee citizens' protection and social integration, and its Mission is to ensure fulfilment of the aims of public social security in the areas of social security contribution, benefit management and the exercise of social action, the use of expeditious technological tools that make it possible to collect and process information in a timely manner is a great advantage for management decision-making processes and results in a more effective public system.

Access to information is therefore essential for improving social intervention and development work. The Social Network is based on a partnership aimed at sharing knowledge and resources in order to optimise local intervention, which is not easy unless everyone working in the area has quick access to information that is as up-to-date as possible.

Information in the social arena is scarce, constantly changing, complex in terms of quantification and has multidimensional characteristics and differentiated scales. In addition, it is also difficult to evaluate the impacts of social intervention in a timely fashion.

Following the implementation of the Social Network Programme, and taking into account the spirit of the regulations governing this programme, the need arose right at the start of the technical supervision by the central authorities for an Information System. This is aimed at fostering articulation between the actors intervening in the area, promoting subsidiarity, facilitating social integration and access to information. It is at the same time based on the principle of innovation, accompanying the social and technological changes that occur with increasing rapidity.

Based on the methodology of the Social Network Programme, which aims to promote effective social development planning, the collection, processing and dissemination of information becomes more important the more it becomes one of the stages of an effective participatory planning process.

Right from the start, the Social Network Centre considered it crucial to construct a twofold Information System for this programme: a Local Information System and a National Information System.

The purpose of the Local Information System is to implement effective information systems making it possible to produce and update local planning documents and disseminate information to all stakeholder agents and entities, guaranteeing all social agents equal access to the information. By producing informational brochures, their own databases and websites, the LCSAs have found innovative and accessible ways to convey information to the partners and the general public. By the first half of 2007 about 14 LCSAs had their own databases and 138 had their own websites. This is quite a positive indicator of the implementation of new tools and work processes on the ground.

The first phase of the National Information System was set up in 2004 on a website

accessible to all municipal councils belonging to the Social Network Programme through a password for all LCSAs.

This website meant that all entities making up the LCSAs had access to the planning documents of all the LCSAs countrywide. They had relevant up-to-date information coming from the central authorities and a series of social indicators, and they could consult useful support documents relating to the work not just of the Social Network but also of other locally developed projects (through the support documents, bibliography, useful links and glossary). The same page also provided an Access database to be developed locally and on an individual basis by each LCSA so as to provide all LCSAs with a record of responses, services and projects in their spatial domains of intervention.

The Forum hosted on the Social Network website was also considered a good instrument for sharing experiences between LCSAs at the national level, since any individual, entity or LCSA could register and enter a collaborative environment for those working in the social arena. By the first half of 2007, 85 members had registered and 257 messages had been introduced and viewed by everyone.

As a result of the evolution of this process and in order to share the information on the Social Network's website, in 2006 the passwords were abolished and all citizens could access the site freely, except for the indicators and reports on the execution of municipal council applications to the Programme. The website also now displays a more systematised indicator search that makes it possible to download the information to easier formats. It has a tool allowing the LCSAs to disseminate their own local initiatives and a new way of disseminating the possibility of making applications for national and even international programmes and measures.

In order to improve the original database and use the new technological utilities available on the market, a new enhanced version of the Social Network Information System database was introduced in early 2007.

The Social Network's level of maturity led to an interest in having integrated records for mainland Portugal, identifying new register and search needs. It became possible not just to search for records available in the municipal council and access information on institutions providing social services, but to do so for other municipalities as well. It was also possible to register and search for partners at the various levels of partnership structures, facilitating contact and knowledge of institutions involved in the Social Network. The LCSA database is intended to be a way of enabling citizens to access public and private social services and responses.

Besides the changes in the operational dynamics of institutions on the ground, in the mentalities of the social actors and in the benefits created for the populations, it was also possible to create and combine at a centralised level a wide range of planning documents on participatory social development that was unprecedented in Portugal. It is important to note that by the first half of 2007 about 700 documents on local planning for the whole of mainland Portugal were available online to all citizens. Since early 2007 it has been possible to consult planning documents and read them jointly at various spatial scales or in accordance with more substantive criteria. This is intended to improve local planning processes, create synergies between municipalities and regions with similar realities and provide better guidance for the recently-created supra-municipal platforms, thus strengthening the reasoning behind the guidelines in the National Plans and monitoring their articulation with the local planning processes.

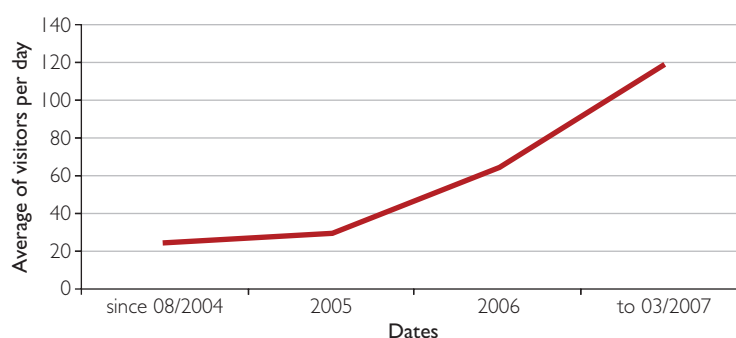
The data below, provided by the IT Institute (Instituto de Informática, I.P.) of the Ministry of Labour and Social Solidarity, shows the change in access to the Social Network site for the general public, an important step in the dissemination of information and in the scope of the main aims of the Social Network Programme.

Table 3 – Visits to the Social Network site by year

| | Since 08/2004 | 2005 | 2006 | Until 03/2007 |
|-------------------------|------------------|--------|--------|------------------|
| Visits | 3 911 | 11 559 | 23 719 | 10 738 |
| Average visits/day | 25 | 31 | 65 | 120 |
| Visitors | 2 121 | 5 717 | 12 919 | 7 175 |
| Visitors only once | 1 609 | 4 231 | 10 283 | 6 164 |
| Visitors more than once | 512 | 1 486 | 2 636 | 1 011 |

Source: II; I.P. (March de 2007)

Chart 2 - Average visitors to the site per day



Source: II; I.P. (March de 2007)

The (georeferenced) cartographic projection of the incidence of social dynamics, the possibility of supervising and disseminating the undertaking of LCSA Action Plans and the extension of the information to be provided to citizens are some of the opportunities – and, at the same time, challenges – that are expected in the very near future.

In order to promote the advancement of the social policies related to the development of the new technologies, it is essential for the local and central information networks to be highly interconnected and for them to understand and use the system's operational mechanisms, thereby providing institutions and the general public with access to information, searches, control and participation.

This is intended to help increase the general public's involvement, bringing people closer to the public authorities and making the participation of all social actors a key factor in the success of the whole process.

2.5 MONITORING & EVALUATION

The competencies of the Ministry of Labour and Social Solidarity, in particular those linked to the Institute of Social Security (ISS, I.P.), regarding the provision of supervision and technical support to the Local Councils for Social Action in implementing and consolidating the Social Network, include:

- Fostering, supervising and evaluating the Social Network in mainland Portugal;
- Articulating and coordinating social policy measures and national programmes in the social arena, promoting in particular the articulation of the National Action Plan for Inclusion with the Local Development Plans;
- Integrated coordination of the Social Network and the Social Insertion Income;
- Periodic definition of circuits and work methodologies used in constructing the SDP and the PNAI, which ensure the articulation of these planning instruments;
- Coordination of supra-municipal platforms by the Directors of the District Centres.

These competencies have been implemented in various areas with a view to gradually increasing the skill level of those involved in social intervention.

The technical supervision of support to the LCSAs has been undertaken by an interdisciplinary team of senior experts belonging to the Department of Social Development.

Support and technical supervision have been provided by central authority experts who have periodically and particularly channelled their priority support to the LCSAs in a phase of undertaking applications.

This phase, with an expected duration of two years, included the setting-up of each LCSA and its operating structures (plenary and executive centre), production and plenary approval of the Site-specific Social Assessment, Social Development Plan and Action Plan, as well as the setting-up of a Local Information System and the Parish Social Committees. The whole of this process was based on participatory methodologies involving the public and private social agents of each municipality.

The areas of technical support comprised the following activities:

- Design of support instruments, partner registration, internal regulation and opinion forms;
- Direct participation and presence at work sessions with the experts fostering the social network in each LCSA, on their own (Intra-LCSA⁴) and in groups (Inter-LCSA⁵), at plenary sessions, executive centre meetings and work group meetings);
- Analysis of documents produced by the LCSAs and assessment of these in light of the Programme's aims;
- Presentation of methodological suggestions to overcome various inherent constraints on the process;
- Production of process monitoring instruments;

⁴ Intra-LCSA Sessions – promoted by the ISS, I.P. monitoring expert for providing specific technical support to a LCSA group based on their needs.

⁵ Inter-LCSA Sessions – promoted centrally, included in the POEFDS and in an identical format for all 277 LCSAs

- Production of periodic reports on the execution of the Programme;
- Production of LCSA opinion grids on applications for projects or social facilities in municipalities;
- Provision of technical support documents to the LCSAs for implementing the Social Network, such as the following: Programme Dissemination Leaflet, Social Network Programme, Work Plan, Social Network Handbook, Social Development Plan, Social Development Resource Handbook, Typification of Situations of Exclusion in Portugal;
- Dissemination of good practices and sharing of experiences between some LCSAs and others;
- Skill acquisition by experts and directors of LCSA partner entities;
- Participation in various initiatives implemented by the LCSAs, such as meetings, seminars, fairs, etc.;
- Organisation of the Programme's national and regional meetings to define contents and the typology of the participants;
- Creation of an information system for the Social Network Programme.

In this context it is important to highlight the availability of the district and local social security office experts and the representatives of various entities belonging to the LCSA Executive Centres, particularly the local authority experts. Their competence in fostering the social networks in their municipalities gave them a crucial role in their implementation. This provided the other partners with knowledge acquired at the Programme's various training actions, which they almost always attended.

Mention must also be made of the specific traits, working rhythms, characteristics and cooperation of the local partners. This provided for flexibility in terms of technical supervision (monitoring and evaluation) and a constant effort to define the guidelines conveyed to the LCSAs, always with a view to meeting the necessary conditions for everyone to achieve the desired results.

The local networks were also aided by external consultants who provided more specific support in implementing the methodologies in question.

NEW FORM OF TECHNICAL MONITORING

Now, following the evaluation of the Programme and the concluding phase of the Support Programme for the Implementation of the Social Network, a new form of technical support and supervision of the LCSAs was established in late 2006 within the scope of the then Department of Social Protection and Citizenship, which involves the district interlocutors for the social network. Their competencies and those for the sector's local representatives in the network's operating structures were therefore defined.

The competencies of these district interlocutors are the following:

- To guarantee the representation of social security at LCSA plenary sessions;
- To provide technical support to the local representatives of the District Centres in LCSA Executive Centres;
- To supervise and monitor at the district level the LCSAs' activity, with respect to the Programme's regulations, philosophy, methodology and principles;
- To identify the priorities assessed by the LCSAs, relating them to those of the social

security sector and, when possible, including them in the supra-municipal strategic planning instruments;

- To ensure the provision of information from the social security sector necessary for the LCSAs' activity, in the context of producing/updating planning instruments and information systems;
- To assist Directors of District Centres in implementing the supra-municipal platforms, ensuring fulfilment of the competencies allocated to them;
- To articulate with the central authorities, ensuring the supervision, monitoring and evaluation of the Social Network within the scope of the competencies of the Ministry of Labour and Social Solidarity.

The competencies of the local social security representatives in the local social networks are the following:

- To participate in the process of disseminating, fostering and supervising the Social Network;
- To collaborate in mobilising the partners and in preparing presentation sessions and/or clarification regarding the Programme;
- To participate in the process and actions of implementing and consolidating the Social Network;
- To collaborate in raising the awareness of partners and motivating them to participate in the Social Network's various structures and actions;

- To organise sessions and set up work groups to supervise the process of implementing Site-specific Social Assessments, SDPs and their respective Action Plans.

Following the implementation on the ground of the Social Network's regulations, by Decree-Law 115/2006 of 14 June, the supra-municipal platforms were created. Their areas of intervention correspond to the NUTS III regions, and, as we have mentioned, they are coordinated by the Directors of the District Centres with the largest number of municipalities in the platform's geographical area.

Convinced as we are that the monitoring and evaluation processes are the responsibility of all the actors involved in the task of improving their spatial domains – which is only possible through participatory planning and shared actions in the form of a network of partnerships such as the Social Network – we emphasise the importance of all actors carrying out this role.

The phased decentralisation of technical support and supervision for the district structures of the ISS, I.P., and the reorientation of the functions and competencies of the central and local technical supervisory teams are already a reality, albeit in an initial phase of implementation. In order to fulfil their objectives, there must be a real strengthening of the capacity for technical support and supervision of the social networks. This is essential for monitoring the execution of their Action Plans, creating spaces for reflective, in-depth supervision of theoretical issues transversal in relation to this type of dynamic, and thus ensuring constant levels of quality and improvement.

CHAPTER 3

EXPERIENCES & PRACTICES

BASED ON THE EXPERIENCES of various LCSAs, it is possible to make assessments, draw parallels and exchange good practices on the issues of planning, local development and social intervention. This opens up new opportunities for dialogue and debate between social agents that may help identify innovative action methods to promote reciprocal enrichment among the various spatial domains.

Although, as we have noted, there are municipalities in the country at very different stages in absorbing the principles and methodology of networking, we think the implementation of the Programme has clearly had visible impact on both institutions and citizens. These results reflect a number of principles, such as the following:

- *Participation*, through the involvement of a varied group of actors, from political players, directors of public, private and social solidarity bodies, companies and civil society in general;
- *Empowerment*, enabling and sensitising local agents by promoting their active participation in community life so that they have more influence and are able to improve their lives and the society in which they live;
- *Innovation*, by adopting a specific approach to certain issues, helping the various actors to assume social responsibility, integrating social dialogue methodologies and disseminating good practices in local development.

We know that not all good practices can be transferred in the same way in different territories. The main purpose of this chapter is therefore to share the experiences of the different Local Councils for Social Action, identifying and divulging initiatives that have at a particular point contributed to the consolidation of networking – especially with a view to improving the services provided and the quality of life of citizens, above all those in a situation of greater vulnerability.

As some of the LCSAs have very specialised knowledge, a great capacity to deal with social issues and are highly receptive to change and partnerships, they were challenged to express this in a text reflecting some of the results of networking.

We heartily thank the LCSAs of Abrantes, Alcanena, Amadora, Anadia, Ansião, Arcos de Valdevez, Armamar, Aveiro, Barcelos, Batalha, Benavente, Borba, Braga, Castelo de Vide, Chamusca, Constância, Entroncamento, Figueira da Foz, Ferreira do Zêzere, Lagos, Macedo de Cavaleiros, Matosinhos, Montijo, Moura, Oliveira do Bairro, Ovar, Paços de Ferreira, Ponte de Sôr, Santarém, Santa Marta de Penaguião, São João da Madeira, Seixal, Torres Novas, Trofa and Valença for responding to this challenge.

We also refer to other experiences of which we are aware, but as this is not an exhaustive list we run the risk of omitting various very interesting and equally impressive initiatives undertaken in the scope of the local social networks' work.

Generally speaking, we have tried to include in this chapter examples of good practices that illustrate impacts on the various sites of intervention, such as the following: ways of organising/ fostering and consolidating partnerships; the process of participatory planning/methodologies and instruments; information systems; LCSA initiatives/seminars/conferences/forums; actions resulting from the SDP by groups/specific sites.

3.1 WAYS OF ORGANISING, FOSTERING & CONSOLIDATING PARTNERSHIPS

When the intention is to set up and consolidate partnerships of whatever nature, it is assumed that they represent a set of entities and individuals with common values and aims. As a result of this convergence, affinities are identified not just in regard to interests but also to goals, leading to cooperative work. This entails optimising various resources and strengths, whereby the various partners conjoin their efforts and tasks to achieve their aims in a relationship between themselves and those who benefit from the intervention.

With a view to fostering partnerships and improving institutional interaction, certain LCSAs, such as **Fornos de Algodres**, included intervention hubs within the scope of inter-institutional articulation in their SDP. The aim of this was to “develop and expand solidarity and cooperation between public and private not-for-profit institutions intervening in the municipal area through organisational methods and regulatory instruments that may result in the rationalisation and articulation of their resources and increase their potential for intervention in the community and, in particular, in the most vulnerable social groups”.

In this area, we may also cite the **Aveiro** LCSA, which developed the Aveiro International Network Project (Projecto RIA - Rede de Intervenção de Aveiro) and set up a partnership of 67 entities with the aim of effectively involving the partners by providing human and/or material resources for its execution.

The **Chamusca** LCSA decided to implement not just a Social Emergency Meetings system in the case of serious situations but also signed protocols with partners with a view to close collaboration between certain municipal entities in sharing human and material resources.

In **Santa Marta Penaguião**, the LCSA also organises plenary meetings on the same date and in the same place as the “Smiles” Project (Projecto “Sorrisos”) Partners Council in order to make the best use of time and human and technical resources.

A very important aspect of fostering and consolidating partnerships is making full use of local resources. An example of this is the **Sabugal** LCSA with its “Emcasa.com” home support project. Following a survey of the municipality’s existing needs in terms of the coverage of Home Support Services and the institutions carrying out this type of service for the population and surrounding parishes, the network proposed making use of, enlarging and qualifying the services provided. The partner institutions in this project receive a common logotype to stick on their trucks, providing them with an identity and ensuring better quality.

The most paradigmatic reference in the **efficient use/combining of community resources** is the implementation of operational models and Integrated Care Systems, which various LCSAs all over the country are already developing. Based on needs identified in the Site-specific Social Assessments, these are supplemented by an inter-sectoral response to the more underprivileged population, coordinated by the case manager.

This model avoids the duplication of experts supervising the same family and brings services closer to the population, enhancing the latter’s participation in their inclusion process, counteracting the tendency for a relationship of dependency and apathy and making better use of the technical resources existing in the sites themselves.

A relevant example in this context and others is the **Matosinhos** LCSA’s Real Insertion in Active Life (IRVA - Inserção Real na Vida Activa) Project, which adopts a single information registration system – a family case file. The benefits this methodology brings are the following: 1. Possibility of avoiding duplication of family/individual cases; 2. Greater standardisation of criteria for assessing situations and more information gathered on each case; 3. Avoiding shunting individuals/families around institutions, producing

more integrated responses; 4. Better use of human resources, reducing waiting time; 5. More comprehensive social action planning.

The **Paços de Ferreira** LCSA has also been implementing the Integrated Care methodology since March 2007, based on a system of partnership between the various local intervention institutions.

The **Trofa** LCSA saw its One-Stop Shop honoured with the Public Sector Good Practices Award in 2007. The shop's governing principle is the concentration of services in a single place where each case is dealt with by one supervisory expert. Three services are provided: Integrated Care, Social Emergency and Information System. In the wake of this experience, other LCSAs are also implementing services of this nature, adapted to the characteristics of each site, which confirms the multiplier effect of good practices.

Regarding the exercise of the **supra-municipal** articulation principle, it is worth noting the pioneering experience of the **Vale do Minho** LCSA, which has introduced an operational and joint intervention model called "Inter-Networks" ("Entre-Redes").

3.2 PARTICIPATORY PLANNING PROCESS/ METHODOLOGIES AND INSTRUMENTS

The essential factor for planning in the sense of an interactive process, fundamental for promoting the socio-economic development of the community, is the active participation of all partners. This is reflected in the experiences described below.

In this area, the **Batalha** LCSA organises the "Network (Re)encounters" ("(Re)encontros em Rede"), with workshops in which all partners participate. The main aims of this initiative

were to identify problem issues, discuss difficulties, identify resources and debate the future prospects for Batalha municipal council in the area of social issues. This method made it possible to direct the intervention at the main problems identified, as each work group focused on a specific issue. The five working meetings held between February and May 2006 produced important information and conclusions which were included in the Site-specific Social Assessment, making it possible to draw up priority social intervention axes to guide the municipal council's social policy.

In a similar way, the **Seixal** LCSA described its planning experience by referring to two stages in constructing the Assessment: a first stage consisting of the Pre-Assessment or (institution-based) Assessment of Indicators and another consisting of an Assessment focused on defining priorities. In order to produce this instrument a series of seminars were held on problems considered relevant that has already been identified. There were also a number of workshops focused on issues identified in the Assessment stage, this time aimed at producing the Social Development Plan. The production of the Social Development Plans was also governed by the concern, in accordance with the stipulations in Decree-Law 115/2006, to articulate with the National Action Plan for Inclusion (PNAI), the National Plan for Equality and the Municipal Master Plan.

The **Santa Marta de Penaguião** LCSA opted for the methodology of joint meetings with private social solidarity institutions' directors to improve intervention planning. This was to avoid the duplication of services or assets, share knowledge and experiences, and recognise the various human resources allocated to surveying training needs, as well as the users included, in order to have a better understanding of the assets to be developed.

The Social Network's good practices do not end with the formation of partnerships or creation of work groups. They go beyond these boundaries and look to the future. An example of this is the Social Network's Monitoring and Evaluation System in **São João da Madeira** – a management operation tool for evaluating the Network's efficacy, efficiency and impact.

The aim of this system is to embrace the long-term structural social changes resulting from the Network's work. The methodology employed arises from a work culture already developed by the Social Network in this municipality, which values, among other factors, empowerment, communication and the co-accountability of all the actors.

3.3 INFORMATION SYSTEMS

In the scope of the **local information systems**, various LCSAs have created websites and databases as potential working instruments for producing a continuous, fast and less bureaucratic flow of information. This responds to the aim of ensuring the circulation and dissemination of important information between the network partners and between the network and the community at large.

The **Batalha** LCSA has introduced a Network Social Information System to act as a link between the partner institutions.

With a view to promoting employability, the **São João da Madeira** LCSA has set up the Employment, Education and Vocational Training Observatory (Observatório do Emprego, Educação e Formação Profissional) in order to promote interaction between schools, training bodies and companies.

The **Braga** LCSA has produced online handbooks, such as the Helpline Handbook, the Resource Handbook for People with Disabilities, and the Education and Training Handbook for 2007.

The **Entroncamento** LCSA is compiling a database in order to coordinate and articulate resources and plan responses. This instrument will be available in digital format and accessible online. It will contain information on family supervision and the types of support received by aid institutions.



INFORMAÇÃO SOCIAL EM REDE N° 04/07

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Batalha, 16 de Março

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1 – CLAS APROVA PLANO DE DESENVOLVIMENTO SOCIAL (PDS) E PLANO DE ACÇÃO PARA 2007



The **Barreiro** LCSA has set up an Online Community (www.communityzero.com/redesocialbarreiro) as a potential work instrument to produce a continuous, fast and less bureaucratic flow of information, responding to the overall aim of ensuring the circulation and dissemination of important information between the network partners and between the network and the community at large.

There are various publications (e.g., books, magazines, local resource handbooks, leaflets and others) on the Social Network Programme and the activity of local networks. These describe the planning outputs and information system developed during the implementation of the Social Network in

municipalities, in order to inform the partners with social responsibility in the municipality of the course of the development so that they can channel their investments appropriately.

3.4 LCSA INITIATIVES/SEMINARS/ CONFERENCES/ FORUMS

The Programme's enormous potential in terms of **social agents' skill acquisition**, for example, can be seen in all awareness-raising, training and information actions taking place in the municipalities. They have the advantage of providing new competencies to the LCSAs' respective partners, composed of individuals from the local community, but they are also often extended to include partners from other municipalities, thereby representing a valuable source for the exchange of experiences and dissemination of innovative practices.

In response to the ongoing concern with **critical reflection** on the processes and dynamics of these partnerships, along with the orientation of social responsibility and civic education towards the participation of the collective, seminars, conferences, forums and other activities have been organised on issues that deserve greater prominence among the LCSAs. Examples of this include the Second Strategic Reflection Conference, themed "Review of the **Loures** Municipal Master Plan – Place-based Sustainability", with the presentation of the Social Network; the forum in **Santiago do Cacém**, with the title "Network Building – Knowing and Acting in an Integrated and Participatory Manner"; and the LCSA seminar in **Alcochete**, "Quality Management and Social Development – From Theory to Practice".

Other training actions on intervention models with specific problem issues such as alcoholism, drug addiction and so on have been organised and have had a significant effect in terms of dissemination to other LCSAs' work groups, on account of the concern to include in these initiatives the **exchange of methodological experiences** among the various types of actors.

These initiatives confer a methodology of ongoing development and skill acquisition on the dynamics of these partnership councils, making other entities, individuals and communities in general aware of this new way of living and developing the collective spirit and integrated intervention.

In this context the **Batalha** LCSA organised the Knowledge Encounter (Encontro do Saber) – a partnership between the LCSA itself, the municipality and the Leiria District Centre of EAPN/Portugal. The underlying idea was to promote the active participation of the municipality's elderly population, with actions also directed at the general population.

In **Abrantes** the LCSA organised the First Abrantes Municipal Social Week from 11 to 15 December 2006, as set out in the Social Network's 2006 Action Plan. Two seminars were held: 1) "Social Network: Networks and Partnerships", where the following issues were discussed: instruments and methodologies in social intervention and networking practices; 2) "Protection of Children and Youth at Risk", which discussed legality, education and health.

In the municipality of **Anadia**, the aim of the First Municipal Training Project was organised to consolidate the partnership and promote the First Anadia Social Fair, the Conference on Quality among the Private Social Solidarity Institutions, mini-forums and seminars and three training courses: Educational Action Assistant Integrated Course, Integrated Direct Action Course and Early Childhood Educators Course, comprising a total of 45 trainees. The project called on the municipality's 17 institutions to participate.

From 27 to 29 April 2007, the **Arcos de Valdevez** LCSA held the Exposocial – promoting the social support outputs and services to the community. Thirty-five entities took part (LCSA partners and companies whose business was related to social activities). This initiative consisted of various kinds of entertainment, talks, workshops and screening actions.

The **Chamusca** LCSA held the Chamusca Municipal Social Week, consisting of an organised visit to the municipality's social facilities and various thematic sessions for the general public.

In **Lagos**, Parish Conversation Community Forums were organised to sound out the population on the problems, needs and possibilities in each parish. The programme consisted of a display of informational material on the Social Network, blood pressure and diabetes/glycaemia checks, a presentation on the Lagos Social Network and a discussion of social issues.

The **Moura** LCSA also held two Guadiana Left Bank (MEG – Margem Esquerda do Guadiana) Annual Meetings in 2005 and 2006, in order to promote discussion and dissemination of good practices regarding social intervention implemented in partnership with the municipal councils and committees.

The Challenges in Intervention seminar organised by the **Torres Novas** LCSA was aimed at professionals in the areas of health, education and social action, and at political and local authority figures, parents and the community in general. The following issues were discussed: education for citizenship, health and ageing. ways of organising work in partnerships, architectural barriers, families at risk, dependencies and mental health.

We should also note the joint organisation by the **Barreiro** and **Moita** LCSAs of a meeting on articulation between the Local Social Networks and the National Action Plan for Inclusion, aimed at clarifying with the social agents of the various partner entities the best ways to implement this articulation, particularly regarding the intervention hubs of the SDP with the priorities set forth in the PNAI for 2006-2008.

Another area in which the LCSA invested was **articulation with university entities** in publicising the Social Network Programme and disseminating good practices in work experience placements, with a view to boosting this articulation not just in the periods of academic training but also regarding the conceptualisation of the measure in the development of future professional practices.

3.5 ACTIONS RESULTING FROM THE SDP BY GROUPS/SPECIFIC AREAS

Portuguese society faces new challenges due to worsening unemployment and insufficient skill sets, the ageing and level of dependency of the population, domestic violence, situations of children and youth in danger, homelessness, drug addiction and other factors. Furthermore, the emergence of recent social vulnerability phenomena means there is a need to prevent and try to solve not just the existing problems but also to minimise the causes of situations of dependency and social exclusion.

The points below illustrate a few of the experiences the LCSAs have been implementing in various areas and with certain specific groups.

EDUCATION, TRAINING AND EMPLOYMENT

In the area of **education, vocational training** and also the **promotion of employability**, some LCSAs have included intervention axes under various names in their planning instruments (SDPs and Action Plans). **Porto de Mós**, for example, has included various courses in its “School education and vocational training” line. Among these are the CAD/Civil Construction Operator Course, the Gardener’s Course, the Commercial Practices Course, the Childcare Course, along with many others included in the Adult Education and Training Programme and aimed at obtaining the ninth-year school certificate and Level II professional certification for young people aged between 15 and 25.

Other education and training promotion projects have sprung from the combined efforts of various local entities, through multidisciplinary intervention in close articulation with the

entrepreneurial fabric, such as, for example, easier access provided by local employers to the information/guidance offered by the Investor Support Bureau.

The Grândola Network for Insertion (Grândola em Rede para a Inserção) project, which resulted from needs identified at the **Grândola** LCSA, through an application to EQUAL, has implemented experiences with regard to **labour integration via the social economy**. It has also published a work handbook for actors with place-based experience similar to the Informal Articulation Model (MAI - Modelo de Articulação Informal) between local companies and institutions, entitled “Practices and Procedures of the Informal Articulation Model”.

In the municipality of **São João da Madeira**, the LCSA runs Employment and Training One-Stop Shops designed to provide information, advice and supervision services in the areas of job searching, training and certification of skills. They also provide a job clearinghouse. The **ESPAÇOe – Support for Entrepreneurial Initiative** (ESPAÇOe – Apoio à Iniciativa Empresarial) involves various partners that intervene in the same spatial domain and is aimed at being as active as possible in promoting entrepreneurial cooperation with the aid of a municipal system for disseminating information to employers and entrepreneurs and in developing initiatives to promote innovation and entrepreneurship.

The experience of the LCSA in **Macedo Cavaleiros** is also quite a good illustration of how the mobilisation of various local agents helps to improve the local economy. The LCSA works to promote local outputs, making them strategic for local development.

The aims of this intervention have been to alter cultural practices (e.g., leading chestnut farmers/producers to adopt other practices helping to make their plantations productive and healthy); to change behaviours and attitudes regarding organisation in order to respond to the challenges of the marketplace; to make the chestnut producers aware of their difficulties but also of their potential, leading them to become gradually more involved in analysing and



solving their problems; to promote/broker a relationship between the chestnut producers and the economic agents in order to break the producer-intermediary-company relationship; to raise the price of chestnuts, making them more profitable for producers/farmers, and to create the conditions for a favourable price/quality relationship.

The farmers have built up a new awareness of their situation, expressing their intentions, wishes and desires and starting to make decisions. The local authority, using the support it has been gathering, has tried to create the necessary conditions for meeting the expectations of the producers. It is significant that the chestnut producers, aware of the difficulties and threats facing their business, have acknowledged that “it has been worth it” and have decided to set up a cooperative and validate this initiative of the partners, who have emphasised that this has produced a meeting of minds and a spirit of cooperation and mutual help that was not due to chance or goodwill but stemmed from a participatory, democratic process which was at all times intended to provide clear, honest and transparent communication.

AGEING AND DEPENDENCY

Various other initiatives are also being developed by the LCSAs in terms of intervention in the area of ageing and dependency, such as the creation of municipal groups for dealing with special issues affecting the elderly, including some actions on the ground aimed, among other things, at reflecting on the issues and problems of this demographic group; preventing and intervening in situations of dependency and risk and fostering an information and support network.

In the municipality of **Amadora**, the LCSA has a functioning home support service (HSS) which sprang from the Home Support in Partnership in Amadora (ADAPT - Apoio Domiciliário em Parceria na Amadora) project – an EQUAL initiative. It has carried out the following actions: more and better HSS– operating 24 hours a day, seven days a week; training for skill acquisition – training courses for human resources working with HSS and for informal providers; quality – implementation of the Quality Manual for HSS in 11 institutions – five institutions are now ready for HSS to be certified under the ISO 9001 standard; Future and Equal for Equal (De Igual para Igual) institutions – a Web Platform is intended to be set up to manage HSS that will include a Resources Guide for this area of intervention.

The **Ansião** LCSA has implemented the Helpline system and in **Alcanena** the LCSA has introduced the Local Social Emergency Service, consisting of a multidisciplinary group including experts from local institutions to provide an integrated response to problem situations involving adults and the elderly.

In a similar way, the **Batalha** LCSA has implemented the “New Springs” (“Novas Primaveras”) project in partnership with the Pousos Arts Society (SAMP – Sociedade Artística dos Pousos), with the aim of providing the elderly with free-time activities, bringing music to the senior population, including the bedridden, and stimulating their creative capacities.

The **São João da Madeira** LCSA has drawn up the Gerontology Municipal Plan, carrying out a gerontology assessment and implementing the municipal Senior's Card, which offers 50% discounts on NHS-subsidised medicines.

The Inter-Generational Meetings are an initiative by the **Santa Marta de Penaguião** LCSA to provide an exchange of knowledge and experiences between generations: primary and lower secondary school students prepare and carry out activities in visits to institutions to assist the elderly. The “Ever-Present” (“Sempre Presente”) project is also being planned – the purpose of this is to produce a tele-alarm system.

The **Braga** LCSA has implemented the Local Volunteer Bank, which has so far carried out six General Volunteer Training actions aimed at candidates enrolled in this local bank. These actions led to the creation of a database of trained volunteers, and there are now 120 candidates for volunteer work. The Local Volunteer Bank contacts and recruits institutions



in order to attract volunteers, and offers to develop joint volunteer projects and collaborate in discussing and providing training actions on appropriate issues. The structure also aims to alert and mobilise the entrepreneurial fabric to the cause of volunteering, and expects to be enlisting companies for Entrepreneurial Volunteering.

CHILDREN AND YOUTH

In the municipality of **Entroncamento**, following an application to the Inclusion and Social Development Programme's (PROGRIDE – Programa para a Inclusão e Desenvolvimento) “Rising Sun Project” (“Projecto Sol Nascente”), the LCSA has created a space for children and youth aged between six and twelve residing in the municipality's social housing areas. Educational actions are carried out here and there is a study room. Meals (breakfast and snacks) are also on offer. This space caters for Pre-school Level 1 and it is planned to set up a family crèche, playground and parents' club.

The projects in which the LCSA are involved in **Gondomar** and **Vila Nova de Famalicão**, for example, have produced a decrease in the notification of dropout rates at the local Committees for the Protection of Children and Youth (CPCJ – Comissões de Protecção de Crianças e Jovens).

The development of concerted strategies by the **Lousada** LCSA, involving the groupings of schools and the community in general, has also had very positive results in reducing the school dropout rate. These experiences bring added value by significantly increasing the levels of these students' social and professional inclusion in the future.

The **Armamar** LCSA is implementing the 36-month “To Choose To Be” (“Escolher Ser”) project, funded by the Choices Programme (Programa Escolhas) and aimed at helping to achieve two axes of the SDP (Axis 1 – Social and Educational Intervention for Inclusion and Risk Prevention; Axis 2 – Schooling, Training and Employability) through four measures:

Measure I – School inclusion, non-formal education; Measure II – Vocational training and employability; Measure III – Civic and community participation; Measure IV – Digital inclusion.

In **Ansião**, the LCSA is promoting the Neonatal Programme, aimed at consolidating the lessons already provided on motherhood; checking the mother's state of health; checking breastfeeding/feeding needs, hygiene care, safety; directing families to special support (e.g., psychologist, family doctor, social security, etc.) whenever necessary; organising mother and child care training actions (e.g., feeding, child hygiene and child safety); sleep and crying; early childhood illnesses; the importance of the parental relationship. A nurse and social worker make home visits to mothers and newborn babies to give them support as they start a new life.



In the municipality of **Alcanena**, the LCSA is administering the project entitled “The More You Know, the More You Are” (Projecto “Mais saber... Mais ser”), aimed at children and youth aged from 6 to 18, in collaboration with teachers, families, health experts and social workers, and education and community action assistants. This has the following aims: to promote school and social inclusion of children and young people in situations of misbehaviour, truancy/failure and dropout problems with a view to achieving equal opportunities and improving social cohesion and the vulnerable socio-economic contexts that cause these situations; to promote healthy behaviour and lifestyles; to increase parental supervision regarding children’s social and educational development; to promote access to education and training courses and to vocational training; to motivate young people in school; to develop skills in parents that instil preventive capacities and develop information strategies and family values.

The **Benavente** LCSA has implemented the “Mental Health in School” (“Saúde Mental na Escola”) project, based on psycho-social intervention in three of the municipality’s schools. The project areas comprise individual and collective mental health, school inclusion and lifestyles. The main actions include the following: Personal and Social Skills Training Programme, Clinical Psychology Office, Individual Monitoring/Conversation with Young People, Social Intervention with Families, Implementation of the Health Education Programme, “Sexual and Reproductive Health” Skills Training, Educational Play Activities and Tobacco and Alcohol Prevention – Education for Consumption.

The **Ferreira do Zêzere** LCSA’s “Growing up in School” (“Crescer na Escola”) project prevents and detects cases of school failure and dropout covering students, families and the school community. Its main action is group work, focusing on basic educational skills and taking active, individualised measures. Also under way is the “Parenting Network” (“Rede da Parentalidade”), aimed at reducing parental neglect and empowering families to become more autonomous.

In the scope of the Choices Programme (Programa Escolhas), the **Montijo** LCSA has developed a project to help prevent risk behaviour: supplying tools to facilitate access to the job market for young people in situations of school failure and/or dropping out. This project also covers leaders of associations and social intervention experts. The Moura LCSA's initiative in the area of children and youth is based on the "Seven Lives" ("Sete Vidas") project funded through PROGRIDE Measure 1 – in particular the "Seeds of Citizenship Action" ("Acção Sementes de Cidadania"). This has led to the formation of the Moura Children's Assembly, representing 12 primary school classes, which explores, debates and reflects on various issues related to citizenship. During the school years from 2005 to 2009 the following issues have been addressed: education for the consumer and human rights, equal opportunities, the environment, and communication and information technologies.

The Children's Assembly is a prime arena for dialogue, analysis and cooperation among primary school students in the municipality of **Moura**. Its mission is discussion and joint action on the municipality's possibilities and limitations. The initiative has five major aims: to improve the personal and social status of children and youth in the municipality; to incentivise the civic participation of citizens in development processes in the municipality of Moura; to create an innovative and effective system for the circulation of information among the municipality's students; to foster dialogue, analysis and cooperation among the municipality's students in identifying problems and producing possible intervention solutions and to promote individual and collective awareness-raising initiatives in respect to the social problems in the municipality.

The **São João da Madeira** LCSA also implements initiatives for young people, such as the "We Young People" ("Nós Jovens") project, which benefits from the collaboration of the municipality's schools in the areas of dependencies and the issues of HIV/AIDS and other STIs, mainly using the following methodologies: peer education, fostering of civic training classes, commemoration of thematic days and development of community-oriented activities.



FAMILIES, THE GENERAL PUBLIC AND OTHER PROBLEM ISSUES

The **Aveiro** LCSA has carried out 22 actions planned and aimed at direct, specialised intervention in the particular problems facing each family. In 2007, there were 11 training actions in the following areas: psycho-social intervention, dissemination of information, training directed at families, social development spaces, dissemination action in schools, promotion of employability, mobilisation of the civil construction sector's local resources, promotion of schooling, volunteer bank, charter of rights and duties of families at risk and educational play spaces.

Based on the need to provide families benefiting from the Social Insertion Income with autonomy, the **Borba** LCSA has promoted actions for the acquisition of personal, social and parenting skills.

As part of the LCSA's work in **São João da Madeira**, structures have been created to help reconcile family and domestic life. The "Changing Life" ("Mudar de Vida") project has also been developed by this network with the aim of preventing domestic violence and family neglect, providing information and offering psycho-social support in order to promote gender equality.

The Municipal Resources Bank has also been implemented in the same municipality. This is aimed at promoting regular food collection campaigns and involves various retail outlets and local residents.

In the municipality of **Barcelos**, the LCSA has promoted the Healthy Lifestyles (EVAS – Estilos de Vida Saudáveis) project, with the support of the Parish Social Committees. This has been followed up by awareness-raising actions focusing on nutrition, health education, sports and the promotion of healthy lifestyles. The project includes sports actions and preventive home visits as well as regular awareness-raising actions.





In **Torres Novas**, the LCSA has introduced the “Included Families Smile and Gain Wings” (FISGA – “Famílias Incluídas Sorriem e Ganham Asas”) project. The aim of this is to implement a series of social responses to promote the acquisition of personal and social skills in children, youth and families living in the municipality. It is intended to set up a Temporary Reception Centre; a Material Resources Centre (including food, furniture, clothing, household appliances and technical assistance) to support families in need; a Family Mediation Office for absenteeism and learning difficulties; and Self-Help Groups for families dealing with alcoholism and psychiatric/neurological issues.

In **Moura** in 2005 the LCSA organised four interactive workshops for the disabled, in the following areas: visual arts expression, painting, dance and sharing. In 2006 there were five interactive workshops: sports sponsors workshop, the First “Para-Interagir” Games (sports event for the disabled), environmental workshop, accessibilities workshop and sharing workshop.

The **Montijo** LCSA implements a concerted action in the area of immigrants and ethnic minorities through the Local Immigrant Support Centre (CLAI - Centro Local de Apoio ao Imigrante), providing legal and social assistance, and the “Tu contas” (“You matter”) project, fostered by seven municipal entities and involving various target groups (e.g., immigrants (and their descendants) and ethnic minorities, children and youth at risk of school failure and/or dropout). The actions include the following: informative and training sessions – reception, local services, access to health, education and equal opportunities; supporting a group of immigrants in the creation of an immigrant association in the municipality and educational play activities to develop individual skills.

Assessment of local networks and demonstration of good practices benefit other municipalities' LCSAs, in particular those having most recently joined the Social Network Programme, like Oporto and Lisbon, for example. In December 2006, the **Lisbon** LCSA approved an action plan which, besides planning and structuring the network, includes specific actions to be implemented in the consensually more sensitive areas, where it is most urgent to achieve articulation between the partners. It also approved the creation of work groups for areas relating to the elderly and the homeless.



CHAPTER 4

CHALLENGES FOR THE FUTURE

THE EXPERIENCE OF THE SOCIAL NETWORK described in the Decree-Law that regulates it presents us with various challenges for the future. In this final chapter, we discuss some of the main challenges posed by the continuation of the Programme, namely the articulation of the Social Development Plans with other planning instruments such as the NAPI, the aims and functioning of the Supra-Municipal Spatial Platforms, the issue of statements and the contracting of interventions related with innovation in specific actions, a constant challenge for the Social Network and one that is essential for us to better serve the most vulnerable citizens.

We are still gaining experience and analysing the best ways to deal with these issues, so the following approaches must be seen as recommendations for action which will be tested and subsequently transformed into guidelines.

4.1 ARTICULATION BETWEEN SOCIAL DEVELOPMENT PLANS & OTHER PLANNING INSTRUMENTS

The need for articulation between dimensions of intervention, sectors and services is a prerequisite of the Social Network, and is at the root of its philosophy. The articulation between planning instruments enshrined in Decree-Law 115/2006 of 14 June is nothing if not an expression of this need, which is intended to be reflected in the Social Network's centrally produced planning documents.

The need to mobilise actors, systematically find out the realities and define strategic aims and goals soon extended to other sectoral areas. The emergence of new assessment and local planning instruments, proposed by various other ministries, made it even more urgent for the Social Network to concentrate on these dynamics¹. The National Plans have also been multiplying. They encompass, on the one hand, the major national challenges to the specific sectors relating to each ministry and, on the other hand, to particular concerns (e.g., the eradication of child labour, the prevention of school dropout, immigration, etc.).

In addition, Portugal's commitments to strategies drawn up at the supra-national level have also required them to be transposed to local plans. This is the case of Agenda 21, for example, where in some municipalities close links have been established with the Social Development Plan.

Decree-Law 11/2006 expressly recognises the need in these terms: "it is essential that in local social planning, as in the efficient use of municipal resources, measures and actions are always defined in the different planning documents, such as the National Action Plan, National Action Programme for Growth and Employment (PNACE - Programa Nacional de Acção para o Crescimento e o Emprego), the National Action Plan for Inclusion (PNAI - Plano Nacional de Acção para a Inclusão), the National Employment Plan (PNE - Plano Nacional de Emprego), the National Programme for Land-Use Policy (PNPOT - Programa Nacional de Política de Ordenamento do Território), the Technology Plan (PT - Plano Tecnológico), the National Health Plan (PNS - Plano Nacional de Saúde), with special emphasis on the National Integrated Continued Care Network (Rede Nacional de Cuidados Continuados Integrados), the Action Plan for the Integration of Persons with Disabilities or Incapacities (PAIPDI - Plano para a Acção e Integração para Pessoas com Deficiência e Incapacidades), the National Plan for Equality (PNI - Plano Nacional para a Igualdade), the National Plan against Domestic Violence (PNCVD - Plano Nacional de Combate à

¹ The first Emergency Prevention Plans appeared in 1995, and in 1998 came the First Plan for Development in Health. In 2001 the municipalities began to produce Plans for the Prevention of Drug Addiction. In 2003 Educational Charters started to be produced, regulating the activities of the Municipal Boards of Education and transferring competencies in this matter to the local authorities.

Violência Doméstica) and the National Strategy for Sustainable Development (Estratégia Nacional de Desenvolvimento Sustentável”.

SPECIAL ARTICULATION WITH THE PNAI

This law makes particular reference to the National Action Plan for Inclusion (PNAI). This special mention is justified by the fact that the document is the result of Portugal’s commitment to the European Union for the promotion of social inclusion. The articulation goes beyond the mere incorporation of the guidelines of this plan into the Social Development Plans and the involvement of the Social Networks in executing and implementing the national goals expressed therein at the municipal level.

The Social Networks are also involved in the process of designing the future PNAIs through the role they can have in contributing to the knowledge of local realities and their intervention priorities and needs. Decree-Law 115/2006 goes further, mentioning the need to create an information system “that makes it possible to collect locally-based indicators to feed into a national database leading to a more thorough knowledge of the realities of the municipalities and the national reality in the area of poverty and social exclusion, and their impacts on gender inequalities”.

This reference is reiterated in the 2006-2008 National Action Plan for Inclusion, following the evaluation of its previous version² pointing to the “need to strengthen the Social Network, investing in its potential for the concerted implementation of policy measures at the local level and for articulation between the national and local levels” (MTSS 2006: 8), and mentioning the role of the Social Network in mobilising the actors for the design and implementation of the goals of the PNAI.

² Cf. Implementation and Update Reports on 2003-2005 NAPS/Inclusion and Update Reports on 2004-2006 NAPS/Inclusion, COM (2006) 62 end, Brussels, 23.3.2006, cited by PNAI 2006-2008, Ministry of Labour and Social Solidarity (MTSS), Lisbon.

Following the approximation of these two mechanisms for the promotion of social inclusion – the Social Network and the PNAI – instruments have been developed to make not just this link more operational but also articulations with other plans.

ARTICULATION MECHANISMS BETWEEN PLANS

The main support mechanisms for the necessary articulation between Plans are the synchronisation of the European schedule for producing the PNAI with the local schedules, the construction of an information system that provides conditions for monitoring articulation of the planning and execution of the PNAI, the battery of indicators produced to harmonise the production of the Site-specific Social Assessments and, finally, the establishment of the Supra-municipal Platforms.

We shall now provide a more detailed explanation of each of these mechanisms.

SYNCHRONISATION OF SCHEDULES

The synchronisation between the European schedules for the National Strategies for Protection and Social Inclusion and the production of the PNAI, the national schedules for the production of these documents and the production of the SDPs at the national level is essential for the articulation to be successful and for the influence between the different levels of planning to be a movement in more than one direction.

Both the National Strategy for Protection and Social Inclusion, as an integrated social policy strategy, and the National Action Plan for Inclusion are effective until 2008.

Therefore, in mid-September 2008, the National Strategy and the next PNAI has to be completed and approved by the Portuguese Government. These documents have to include the most accurate and realistic assessments, produced locally through the Social Network's participatory Site-specific Social Assessments.

The Site-specific Social Assessments must exactly pinpoint the municipalities' main social problems and the intervention priorities. These constitute essential aspects for the Coordinators of the PNAI to take into account in devising the National Strategy and the PNAI, reflecting the influence of the Site-specific Social Assessments in the national assessment and thereby ensuring that these documents reflected the national reality.

The Supra-municipal Spatial Platforms also has to approve strategic guidelines outlining the priorities, objectives and goals for the municipalities included in the respective (NUTS III) spatial units. These guidelines must contain indications regarding the priorities and goals of the PNAI that match the local areas' characteristics and problems and have to be included in the Social Development Plans. They also must cover aspects where a more distanced, supra-municipal perspective is essential, as in the case of balanced coverage of the NUTS by social facilities and the consequent definition of priorities.

The LCSAs therefore have to be able to include these guidelines systematically and coherently in their respective SDPs and Action Plans. This ensured top-down planning and that the PNAI is appropriate for local problems. Better still, it fulfils the Social Network's aspiration of making the strategic planning process simpler, faster and more effective, safeguarding specific local characteristics.

THE INFORMATION SYSTEM

The Information System is described in more detail in another chapter of this document. It includes a database of the LCSAs offering utilities that can be good resources for monitoring not just the planned articulations between local and national plans but also local contributions to fulfilling the national goals set out in the plans.

This database, in a phase of being completed at the time of writing, is being linked to a georeferencing system which will make it easier to view the information and provide a

spatial reading of the articulations between the various national and local plans in a way that has never before been done in Portugal.

In a phase of expanding the IT functionalities currently in use, the Information System also makes it possible to provide a portrait of the problem issues shown in the Site-specific Social Assessments produced in LCSAs in mainland Portugal, again with the opportunity for spatial projections which can make it easier to design future PNAIs.

There is also another operational articulation mechanism, in this case with the PNAI, which makes it possible to harmonise the information support on the basis of which the Social Network's Site-specific Social Assessments are constructed – the List of Reference Indicators for the Site-specific Social Assessments.

LIST OF REFERENCE INDICATORS FOR A NEW GENERATION OF SITE-SPECIFIC SOCIAL ASSESSMENTS

This battery of indicators should be seen as a reference for the construction of the Site-specific Social Assessments and not an exhaustive list of all the information relevant for analysing the social reality of municipalities. It is a mechanism that provides the comparative reading necessary for a systematic knowledge of the national reality. It also makes it possible to incorporate the main European and national guidelines at this level.

The battery of indicators covers the thematic areas of wellbeing included in the inclusion goals of the Strategy for Social Inclusion and Social Protection and contains references characterising the sites that serve to contextualise the problem issues relating to access to or exclusion from particular rights.

The battery is therefore composed of indicators in the following areas: income and inequality, employment and unemployment, economic activity, education and training,

social protection, housing, demographics, health, culture, sports and leisure, and the environment.

Having started from the basis of the areas of wellbeing covered in the assessment of the Portuguese situation produced in the context of the PNAI, this is an attempt to transpose them to indicators provided at the municipal level, always with a view to having information that can be regularly updated.

This exercise in transposing and selecting indicators presented certain difficulties, as the nature of the sources used as a reference for the construction of the national reports stands in the way of automatic transposition. On the other hand, the level of detail of the information and the complexity of the intended assessments are often impossible to achieve through data collection at the municipal level, or at least not with the desirable regularity³. The same difficulties are often encountered if we take into account the indicators from national sources selected by the Coordinators of the PNAI to complement the portfolio of indicators proposed by the European Commission. It is in the context of these limitations that the proposed battery is being finalised.

Regarding *income and inequality*, information on income levels was sought through salaries and data from income tax and purchasing power records. In order to verify the existing disparities, the way in which these were distributed among the municipalities was also considered. Finally, this was to be completed with information on access to particular goods, deemed – with the very limited information available at the municipal level – to be indicators of consumption levels.

Employment and unemployment include the unemployment and long-term unemployment

³ Examples of indicators that cannot be transposed from currently available information to the municipal level are the poverty rate, either by age groups, by gender, by type of family or even its total figure and the number of families without any member included in the job market. This reveals the gaps that still exist in the study of poverty and social exclusion-related phenomena, making it impossible to monitor these phenomena beyond the major spatial-level breakdowns or to have the capacity and local intervention strategies to reduce the occurrence of these phenomena.

rates that constitute municipal information on unemployment⁴. The structure of the local employment market is described using information on activity sectors and professional groups obtained from censuses or from staff records.

Another aspect considered was *economic activity* which, based on information from staff records and a National Statistics Institute (INE - Instituto Nacional de Estatística) survey of companies undertaken regularly⁵, provides contextual information on the economic fabric⁶, so that we can better understand the dynamics underlying the production of the phenomena of poverty and social exclusion.

Regarding *education*, an attempt has been made to provide a general description not just of the population's access to this right (e.g., through the illiteracy rate, percentage of dependent workers by educational level, pre-school rate, school dropout rate, early school dropout rate, early leaving, population with compulsory level of schooling or less), but also of the existing municipal resources (e.g., number of schools by type, number of students per teacher and type, etc.).

With regard to *social protection*, the information to be analysed mainly concerns the coverage of the responses in the arena of social action and the information on beneficiaries and amounts of the benefits, in an effort to include relevant indicators for determining standards of living through income levels⁷ and to identify the incidence of the most needy layers of the municipal population⁸.

⁴ In brief, this rate is calculated by comparing the unemployment data recorded by the Employment and Vocational Training Institute (IEFP – Instituto de Emprego e Formação Profissional) with information collected through the Employment Survey.

⁵ This is the Statistical Units Record.

⁶ This includes information on the number, size, economic activity, staff employed and sales volume in companies with a registered office located in the municipality

⁷ Identifying average figures for the various types of benefit (e.g., family and pensions).

⁸ Via the weight of the benefits provided to the most needy layers of the population: recipients of family benefits, such as first-grade family benefits, Social Insertion Income beneficiaries, disability beneficiaries, third-party assistance subsidies, social pension holders, unemployment beneficiaries, etc.

Regarding *housing*, the focus is on gathering knowledge on housing conditions, the relationship between demographic growth and housing dynamics and the occupation rate of existing dwellings, although this is mostly based on data from the 2001 censuses.

Also included were basic *demographic* indicators regarding changes in population, age group structure, family dynamics, migratory dynamics and the disabled population. This set of indicators mainly provides information describing the context, which is important for knowing the background to some of the principal challenges in promoting local social development.

In the case of *health*, due to the sparse and disparate data at the municipal level, it is again not possible to link the indicators to the guidelines for the production of national-level assessments by the European Commission. Therefore, as we have already noted in the case of education, the indicators used are for access to health⁹ and resources at the disposal of the municipalities' inhabitants¹⁰.

Also included were indicators for access to culture, sports and leisure that mainly comprise information on the resources available as well as on municipal expenditure in this area.

Finally, indicators were included for environmental protection centred on municipal expenditure on the management and protection of the environment and basic sanitation, including data on environmental and sanitation conditions.

⁹ Infant mortality, deaths by main causes of death, percentage of assisted births, mortality rate caused by HIV/AIDS, consultations by main categories existing at the Health Centre, etc.

¹⁰ Number of doctors and nurses per 1,000 inhabitants, number of hospitals, etc.

4.2 SUPRA-MUNICIPAL SPATIAL PLATFORMS

CREATION OF SUPRA-MUNICIPAL SPATIAL PLATFORMS

The idea of setting up the platforms first arose in November 2001, in the Execution Report on the Social Network Pilot Programme, in which the Social Network Centre evaluates the pilot programme and makes a number of recommendations and proposals on the Programme's future orientation.

The first recommendation – that the possibility be studied of proceeding with supra-municipal social network structures – is aimed at creating conditions for articulating forms of planning at different (i.e. local and national) levels. It points to the need, in the future, for a single planning instrument at the municipal level with a view to integrated (i.e. social, economic and environmental) local development, in the spirit of the 1995 United Nations Copenhagen Conference.

The CMR 197/97 regulations were confirmed in Decree-Law 115/2006 of 14 June, which assigns the establishment of spatial platforms equivalent to the NUTS III regions – i.e. 28 platforms – in order to guarantee articulation and supra-municipal planning. It considers the Social Network to be the ideal instrument for implementing the PNAI.

Clearly, the characteristics of this new networking structure follow the model already enshrined in the constitution of the LCSAs and Parish Social Committees – i.e. they are composed of leaders of the public and private entities that operate in the respective site, namely the chairs of the LCSAs, the directors of the Public Administration services, the representatives of the solidarity institutions and employers' and union associations, the representatives of the civil governors and the director of the District Centre that undertakes

the coordination of the platform. The Platform is transversal to the different areas of intervention and the leaders represented on it must have decision-making capacities.

PURPOSE AND ACTIONS OF THE SUPRA-MUNICIPAL PLATFORMS

The purpose of the supra-municipal platforms, which are spaces for discussing and analysing the social problems of the municipalities that they comprise, is to promote the articulation of the local planning instruments with the national plans, measures and programmes. This encourages concerted supra-municipal planning and makes for better organisation of the intervention, productivity of the resources of all the sites and a balanced distribution of social responses and facilities in the respective NUTS III regions.

In addition, this entity is responsible for promoting the circulation of information, in-depth study of sectoral issues and harmonising initiatives. It brings together decision-makers and those responsible for defining sectoral and thematic priorities, or at least for implementing and monitoring them. This is the best arena in which to compare the strategies issued by the various competent entities and to ensure that they are passed on to the municipal partnerships via their chairs or other representatives involved in the work of the LCSAs.

The competencies of the platforms are described in the Decree-Law. The main point, of course, is to ensure that the PNAI is implemented on site.

The future articulation of the PNAI with supra-municipal planning instruments and with these local plans will ensure vertical articulation between planning levels (from the national to the local), as well as the horizontal articulation of the different policy measures and their effective implementation on the ground.

The local social networks have already participated in the design of the current 2006-2008 PNAI, although the participation mechanisms will have to be extended in the future. All over the

country, Inter-LCSA meetings of the Social Network have taken place, enabling the partners to reflect on the implications of the PNAI for networking and to express their opinions, especially on the priority aims.

With regard to planning, the spatial platforms must issue strategic guidelines to match the priorities, aims and goals of the PNAI to the specific characteristics of their sites. The LCSA will implement these in the local SDPs and Action Plans, which will require the platforms to act in harmony with the timeframe for the production of the PNAI, as noted in the previous point.

But the intervention of the platforms is not confined to ensuring the implementation of the PNAI on site. The platforms must discuss the most important problems facing their municipalities and define appropriate intervention strategies that can be applied by various LCSAs in their spatial domain, or else refer them to the national level.

One important task that the platforms will certainly have to assume is to help ensure that coverage in terms of social facilities and responses in the municipalities becomes more balanced and better meets the citizens' needs.

Finally, the spatial platforms are a prime arena for promoting the exchange of experiences between municipalities, for disseminating good practices, for proceeding to standardise certain working methods of the different entities and for creating common languages to facilitate cooperation and articulation of the work carried out by the partners.

Imagination, the ongoing work and the accumulation of local experience will certainly result in the emergence of other actions.

EARLY RESULTS AND FUTURE EXPECTATIONS

The supra-municipal platforms were mostly established in the final quarter of 2006. During 2007 the meetings of the platforms resulted in greater familiarity with the different partner

entities. Important problems started to be discussed and good practices were disseminated, especially the integrated care systems which produced truly good results in a considerable number of municipalities.

Certain resources and instruments for social intervention have also been disseminated and made more widely known, such as the new PNAI, the National Strategic Reference Framework (QREN - Quadro de Referência Estratégico Nacional) and other important programmes, including the New Opportunities Programme (Programa Novas Oportunidades) and the Continued Care Network (Rede de Cuidados Continuados), which have been presented and discussed in various platforms, as well as other locally suggested issues.

The Social Network has been set up throughout mainland Portugal and, in only six years, it has become an example and a reference for innovation in working methods, ways of thinking and organisational cultures themselves.

We therefore consider that the supra-municipal platforms, with their broader outlook on problems, will benefit the work developed in municipalities and parishes and will lead to innovation and improvement in local work, in particular raising the standard of networking and contributing to the success of a fluid and effective planning model from the national to the local level.

4.3 ISSUE OF LCSA STATEMENTS

Local development must be perceived as an integrated planning project, not just from an economic standpoint but also as a result of the relationship of conflict, competition, cooperation, negotiation, partnership and reciprocity between the various actors involved.

In this context the implementation of the Social Network Programme also entails the use of instruments that must strengthen the role of the locally based social networks, with a special emphasis on the importance of the statements of the Local Councils for Social Action.

This level of concern was enhanced with the introduction, by Decree-Law 115/2006, of the compulsory issue of these statements by LCSAs for publicly funded project applications and social facilities and responses. This process resulted in greater recognition and legitimisation of the role of the local social networks, contributing to the importance of LCSAs in the eyes of the local entities.

A point in relation to the statements could have been included in the previous chapter, since the introduction and development of the opinion grids came as a result of the operations of the local networks. However, we decided to include it in the final chapter as a challenge because the fact that the statements have become compulsory and a single grid applicable to all LCSAs in identical circumstances has placed new demands on their use.

We also consider that the issue of statements, using a national grid, is a challenge, since their correct use has strong implications for the consolidation of networking and reflects the local networks' level of maturity.

The need to create grids for the issue of statements has been felt from an early stage by some LCSA which pioneered the initiative of adapting the national grids themselves to facilitate the evaluation of social projects, many of them part of publicly funded programmes whose applications (Anti-Poverty Plan (PLCP – Plano de Luta contra a Pobreza), POEFDS, “To be a Child” (“Ser Criança”), etc.) already mentioned that the LCSAs should express their views on the importance of these for their spatial domains.

This good practice was rapidly assimilated at the national level, leading the Social Network Centre in 2002 to produce an opinion grid that, for the first time, set out to suggest evaluation criteria. However, it was not compulsory and only became so with the publication of Decree-Law 115/2006 of 14 June.

On the basis of these regulations, and as examples of the compulsory issue of statements, we refer to the laws on Local Social Development Contracts (Ordinance 396/2007 of 2 April), the Housing Comfort Programme for the Elderly (Programa Conforto Habitacional para Pessoas Idosas) (Dispatch 6716-A/2007 of 5 April), the Regime for the Licensing and Control of Service Provision and Social Support Establishments (Decree-Law 64/2007 of 14 March) and finally the Programme for the Enlargement of the Social Facilities Network (Ordinance 426/2006 of 2 May).

Based on the principles of the programme, mentioned in Decree-Law 115/2006 of 14 June, the improvement of the opinion grid was reviewed and the Social Network's evaluation criteria and their impacts were specified. The work took place in a multidisciplinary environment that involved the ISS, I.P., Child Protection, Citizenship, Planning and Information Systems Departments, in successive work sessions culminating in the presentation of the current grid for the issue of statements.

Their production was based on a multi-methodological process involving the use of various techniques and methods, in particular the formulation of problems through a semi-structured approach that included the design of cognitive maps using Decision Explorer software, the analysis of clusters on the maps produced – which made it possible to mark out the main dimensions of analysis and potential axes for evaluating projects/applications – and finally the multi-criteria methodology for backing up the decision. In this final stage, the descriptors of impact, preferred cardinal scales/functions and weighting coefficients for each of the criteria were constructed using M-MACBETH software.

The competent structure for issuing the Social Network's statements is the Executive Centre, as mentioned in Article 28(n) and (o) of Decree-Law 115/2006 of 14 June. However, every opinion issued by the Executive Centre will only be valid after approval and deliberation by the LCSA Plenary (deliberative body), as mentioned in Article 26(h) of the Decree-Law. This deliberation is sovereign, in respect both of validating and of amending the opinion of the Executive Centre. In the case of the latter situation, the minutes (or draft minutes) must

always record the grounds for the amendment and a second grid must be drafted reflecting the rectifications.

The criteria on the current opinion issue grid are in conformity, as already mentioned, with the Network's principles and carry different weightings, incorporating a number of levels of impact to be evaluated by the LCSAs when the applications are assessed. The weighting covers a range of 1 to 100%, and a quantitative mention of less than 50% denotes an unfavourable opinion.

The grid is composed of eight criteria:

- *Relevance* (evaluates how the application/project matches the LCSA planning instruments – Site-specific Social Assessments, Social Development Plans and Action Plans produced and approved by the LCSA Plenary);
- *Subsidiarity* (evaluates to what extent all the resources and/or potentialities available in the municipality that can (partially or totally) be made use of have been checked/assessed/used in order to respond to the need(s), objectives and recipients specified in the application/project);
- *Concertation* (evaluates to what extent the application/project submitted is the result of a prior agreement at the LCSA regarding the application/project and the entity/entities best equipped to submit it);
- *Partnership* (evaluates the existence of working in partnership in the production of the application/project that may allow for the shared management of resources whereby each partner uses its speciality to produce a better quality response to the population);
- *Innovation* (evaluates the existence of components in terms of methodology, strategy

and results that make it possible to distinguish the application/project taking into account current practices);

- *Dissemination* (evaluates the existence of mechanisms in the application/project that make it possible to provide feedback to the Social Network's (local and/or national) information system regarding the situation and results thereof);
- *Employability* (evaluates to what extent the application/project creates or retains jobs and promotes the skill acquisition of human resources);
- *Sustainability* (evaluates how the continuity of the response/service in the future is assessed, at the end of the implementation phase of the application/project).

The growing importance of the municipal Social Networks' statements and consequent involvement of the LCSAs in decision-making processes and in drawing up place-based economic and social development planning strategies is therefore in a stage of consolidation. The overriding aim is the exploitation and equitable distribution of the available resources, based on close communication between the local and national levels, whose interaction is intended to lead to better results, based on a methodology of planned, concerted work that is efficiently and effectively executed.

The issue of statements by the LCSAs is an act of great importance, transversal to the structures and strategic mechanisms of the Social Networks. Primarily, the number of applications for a particular source of funding means the local information systems are working well. But the correct and fair issue of statements depends on the good work of the Executive Centres, on their careful analysis and rationale, and the subsequent approval by the LCSA means the partnership is working well and helps towards its development and consolidation. Finally, there are only good partnerships when the planning has been well executed and the priorities clearly defined. A good selection of applications will favour the fulfilment of the objectives specified in the Action Plans.

The issue of statements is therefore a learning process in which the consolidation of the networking is at stake. When this instrument is well used, this means that the local entities involved have gone beyond defending their own interests and have started to think about creating conditions for implementing the actions and projects approved and solving the municipality's problems. The LCSA must rise to the challenge of qualifying the statements issued, making them more credible so that they acquire greater weight.

4.4 PLACE-BASED SOCIAL INTERVENTION & CONTRACTING

In this new stage of its life, the Social Network or, rather, the set of local networks must show that it can do more and better for their respective spatial domains and for the more underprivileged citizens who are victims of exclusion.

The Programme has therefore disseminated and popularised two key concepts: place-based interventions and the contracting of interventions between different local entities.

The recognition of the existence of processes that situate poverty in and/or marginalise particular places, as well as of the multi-dimensional nature of the phenomena of poverty, has helped to disseminate the idea of promoting transversal interventions with a well-defined spatial scope.

The idea of place-based intervention was to stimulate the emergence of multi-disciplinary interventions, transversal to different areas (e.g., health, education, social action, employment, housing, etc.) and focused on solving social problems affecting specific urban or rural locations that are particularly vulnerable to situations of poverty and social exclusion that afflict places and their inhabitants.

It is important to note that place-based interventions are not a substitute for sectoral ones that benefit underprivileged groups or support families and individuals. The former have different characteristics and must complement the latter.

National and community experiences permit us to summarise the theoretical and practical perspectives of place-based social intervention into three main aspects:

Firstly, place-based intervention is based on the concept of social development and is part of local development.

Secondly, it adopts an approach of fighting poverty and exclusion by developing communities and promoting the inclusion of individuals and places.

Thirdly, it is based on a multi-dimensional integrated approach to problems, assuming the development of multi-sectoral interventions, planned and executed in partnership by various institutional actors.

The best way of proceeding with these integrated interventions is the contracting of the interventions between local partners, as in the national plan. This is, indeed, a challenge that Decree-Law 115/2006 presents us with when it states, in Article 33(c), that social intervention is carried out through the “Contracting of an integrated place-based intervention model through a protocol between managing entities of the programmes concerned and the projects’ promoting entities, with intervention in the area being designed to rationalise the resources in the same site of intervention”.

FROM THE NATIONAL PLAN TO THE LOCAL PLAN

In response to the challenge presented in the Decree-Law on the contracting of a place-based intervention model, the Local Contracts for Social Development (CLDS - Contratos

Locais de Desenvolvimento Social) Programme was launched in April 2007 with the aim of fighting poverty and social exclusion in depressed locations.

For the first time in Portugal, learning from prior programmes such as the Anti-Poverty Programme and PROGRIDE, the management model covers funding from centrally-selected projects in which the most vulnerable populations have been previously identified.

Also unprecedentedly, local projects will have to include compulsory actions, which entail concentrating local resources along essential intervention axes (e.g., employment, training and skill acquisition, family and parental intervention, empowerment of the community and information and accessibility), in addition to other non-compulsory actions selected by the local projects.

The CLDS action plans are produced on the basis of the Social Network's partnership structures and planning instruments, and after consultation with the LCSAs they are approved by the municipal councils.

The model for contracting between different local public and private entities for the development of structural interventions in particular locations with higher poverty and exclusion rates, now launched in Portugal, has been implemented in various countries, such as in France (with the second generation of the Contrats de Ville), Ireland (with the Area-Based Partnerships) and Sweden (with the Local Development Agreements).

In these programmes it is worth noting, as essential factors for the success of these interventions, the fundamental importance of political will, since these are national inter-ministerial initiatives; the concentration of EU and national public resources to tackle the problems consistently and continuously; and the involvement of partner entities based on protocols or other forms of contracting.

These EU programmes, like the Portuguese CLDS Programme, are aimed at developing integrated actions to transform the sites into areas enhancing development and have certain basic assumptions in common:

- Concentration of means and resources to attain objectives resulting from participatory assessments and ways of planning;
- Inter-sectoral cooperation between entities of a varied nature, organised from the local level (e.g., local authorities, social security, schools, job centres, vocational training centres, health services, local associations, etc.) to the national level (e.g., inter-ministerial articulation);
- Objective-based management, making it possible to interlink national policies and objectives with local objectives, and providing the basis for essential monitoring and evaluation.

What we wish to emphasise is that the contracting model for interventions need not depend on the existence of nationally funded programmes and may have various levels – i.e. it can be produced in a neighbourhood or parish on the initiative of a greater or lesser number of partners that wish to help achieve certain goals previously defined between the partners.

The integrated care projects are an excellent example of what the contracting of a place-based intervention model is. It has limited but far-reaching aims of improving the care provided to all families through spatial decentralisation, in order to cover all or part of the parishes in a municipality, and of concentrating and making the best use of resources. These aims are stated in the protocols signed by the public and private partners that implement the project.

These projects, which were first implemented in two municipalities in the districts of Braga and Oporto and are now spreading throughout the country, are also an excellent example

of how this intervention model can be effective and produce better results with the same resources.

The spread of this contracting model of integrated interventions between different partners, without detracting from the identity and individualised actions of each one, will undoubtedly contribute to achieving the goals of the PNAI and to the social development of the local sites and the municipalities themselves.

IDENTITY AS A DETERMINING FACTOR OF PARTICIPATION

Before discussing the importance and the aims of contracting, it must be emphasised that participation in strategic planning or the signing of protocols for ways of joint intervention in no way reduces the particular identity or affects the autonomy in the autonomous action of each Social Network partner involved in these forms of participation.

In the annual planning of the action of the Local Councils for Social Action there are sometimes signs of certain difficulties in differentiating between what is an entity's individual action, what part of the latter is part of a collective intervention and what is a collective intervention in and of itself; the efficacy and efficiency of the latter two are now guaranteed by the work of the local social networks.

Actively participating in a collective structure must not call into question the individualised intervention and identity of each partner, which must exist and be respected on their own terms. The affirmation of this identity also entails the integration of planning methodologies in the practices of all entities. Various interesting work dynamics have been tried out in the LCSA up to the production of the action plan. But it is important to

emphasise that the aim of the Social Network is not confined to the goal of producing this operational document. That is where everything begins. Making the plan is the start of a collective process of intervening in the reality of the municipality, so that strategic spatial planning can be implemented as efficiently as possible.

Only on the basis of a clear identity, strategically organised and disseminated in the forum of the partnership, will it be possible to benefit from sharing and to reap the rewards of participating in the collective. These results can be seen both in the greater efficacy of the municipality's intervention and in the profitability and improvement of the same entity's intervention.

In some cases, however, we see an action plan in the image and likeness of the entity/entities that produced it, outlining general intentions rather than realistic, achievable actions based on the priorities decided for each year and with operational responsibilities defined for each actor. Hence the dissemination of each partner's activity and its active participation in the production, execution and evaluation of the Social Network's annual action plan is essential for achieving the intended results.

This intervention model is based on equality and not on subordinate relationships between partners. All the Social Network's procedures must be guided by respect for each one's knowledge, potentialities and intrinsic worth, irrespective of each one's competencies and levels of participation at a given moment. Individual interests may be legitimate, but in the ethos of place-based development they must be put at the service of common objectives for the benefit of the municipality. This model of working in partnership draws its inspiration from the principle that "the whole is greater than the sum of the parts" – without disregarding any part(y) that excels through its commitment and responsibility.

