



**sustainability  
intelligence  
in action**  
make it happen

## PRESS KIT

### SAIR DA CASCA – MILITANCY AND OPTIMISM

#### FOCUS ON IMPACT

**Our commitment to a sustainable world, at present and in the future, is based on the services we provide. Our success is measured by our client's progress.**

#### **Sair da Casca in numbers**

More than 1.700 managers trained in sustainability (2004 a 2013) all around the country.

More than 150 educational projects making an impact on two million children, since 1994.

About 250 hours of classes, lectures and training offered at universities, NGOs, etc. (2004-2013).

More than 165.000 website visits, (2004 a 2013).

#### **Consumers**

The projects we develop help raise awareness, educate, inform and involve customers and consumers. What is at stake? Rewarding sustainability criteria by changing consumption behavior and choosing better when buying. Also at stake is greater trust between the business world and society in general, who are mainly unaware of the contribution from the business sector.

#### **Community**

Sair da Casca was inspired by an ambition: to build a more ambitious project for our clients, which is not limited to the practice of philanthropy but integrates environmental and social issues and provides real answers to society. This allows companies to listen to their communities, use their knowledge, resources and expertise to contribute to educational and environmental projects, to training and economic co-structuring with their stakeholders.

#### **Value Chain**

In our vision of social responsibility, delving into the value chain is of key importance, a factor of innovation. This enables suppliers to contribute to the improvement of their performance, to develop new economic models allowing excluded populations, to be included, such as small producers and vulnerable employees.

#### **Company**

What changes a sustainability project in a company? The answer is multifaceted. We can speak of the production chain, the introduction of new indicators for evaluation, of a new communication strategy. It's a new attitude and an enquiry into how to conduct initiatives with stakeholders. But above all we are talking about mitigating the impacts of the product throughout its life cycle, a true integration of sustainability in the core of business.

## ABOUT US

Founded in 1994, Sair da Casca was the first consultancy company in Portugal on corporate social responsibility and sustainable development.

**As a sustainable development activist, our company wants to encourage and monitor the transformation process of our clients and relationships with society.**

We define our **mission** this way:

- Stimulating change and accelerating transformation, through actions focused on results and impacts.
- Encouraging cooperation between companies and society, strengthening trust between the different stakeholders.
- Developing skills, educating and mobilizing for sustainability.

## WHAT SETS US APART

### Our identity

We are a results oriented company with a social mission that inspires all our actions.

### Research, innovation and sharing are part of our DNA

- SMARK launch, a Sair da Casca exclusive tool that measures companies contribution to society (2015).
- Sair da Casca participated in SEFORIS study, and international research project focused on social companies, financed by the European Commission (2015).
- Publishing of the study on companies' contribution to education, which counted with the participation of over 100 professors (2015).
- *Empresas Sociais em Portugal – Passar à acção*, a workshop focused on social businesses that took place in June as part of the European project ASII (2015).
- Guide "Responsabilidade Social das PMEs", resulted of a GRACE work group, under the guidance of Sair da Casca. The study is available online: <https://lnkd.in/eN-Qxsdless> (2015).
- Development of a model of strategic philanthropy for a Bank in Angola, managing a 20 USDM budget (2015).
- Since 2013 we are managing two big Social Programs for EDP and Continente - more than 3 USDM in donations (2015).
- Interviews and engagement of clients and partners to design the post-20 years strategy (2014).
- Sair da Casca was part of the project GRACE "como mobilizar as empresas para projetos sociais" (2014).
- Become a member of the network CONVERGENCES, the first European platform for analysis and reflection, dedicated to the establishment of partnerships between public entities, companies and the third sector (2014).
- New edition of the Study on companies' donations, featuring the support of Informa DB (2013).
- First workshop with the BCSD to present a social impact tool (2013).
- Sair da Casca is COUNTRY PARTNER DA SOCIAL INNOVATION EUROPE, an initiative of the European Commission (2013).
- Created a new company, FINANCE FOR SOCIAL IMPACT (FSI): the first company in Portugal dedicated to develop social investment and assess the impact of social projects in Portugal. With the support of CDI a French social investment fund and European Commission that finance our first project (2013).
- Nathalie Ballan is part of the European Unions' Experts Group on SME's Sustainability (2012).
- Publishing of Quociente Futuro, a Volans's study, translated into Portuguese by Sair da Casca (2012).
- Presentation in Paris of the Action Tank Portugal, on the plenary assembly of the French movement *Entreprise et Pauvreté* (2012).
- Research with BCSD Portugal on the issue of measuring social impacts (2011).
- Creation of the Action Tank Portugal dedicated to inclusive and social business (2011).
- Sustainability expert of Greenfest festival (2011).

- First carbon footprint rating of the bank sector, in partnership with the French consultancy Utopies (2010)
- First review of compliance with AA1000 SAS, in partnership with the English think tank AccountAbility (2010)
- Development of a methodology to evaluate and restructure the business practices of philanthropy (2010)
- First study on Business and Community - "The Social Role of Enterprises" in 2010, new edition in 2011.
- State of the art study in Responsible Communication, publication of the first Eco-communication Guide in Portugal (2008).
- First workshop on Responsible Communication (2008).
- First national and Iberian rating on transparency: Engagement Rating Portugal (2007-2011)
- Workshop "Business and disability: employ, integrate and win" (2006).
- Launch of the first training and awareness workshop for Portuguese business managers on corporate social responsibility and sustainability, in partnership with BCSD Portugal (2004).
- Publication of the first study on the "Social Responsibility Perception in Portugal", an initiative under the High Patronage of the Presidency of the Portuguese Republic.
- First Portuguese web site on corporate social responsibility, distinguished with "The Best Website of the Year 2003" by the Portuguese Association for Corporate Communication (APCE).

## **Partnerships**

We expand with our partners and stakeholders. We share research projects, methodologies and experiences and we get inspiration from the best national and international experts. Our proximity to the voluntary sector enables us to mobilize stakeholders into our projects and our customer's projects.

We are focused on impact, and we believe that the right partners give our projects a major boost. Our job is to give impact, visibility and recognition, to our client's projects and bring in the best and most qualified experts in each field. Therefore we form partnerships with recognized groups who make a more significant contribution to each idea. We are also part of the focus and discussion groups of different themes enabling us to follow the vanguard and leading experts, nationally and internationally.

### **International partners:**

- AZAO – a French company specialized in "Business and Society", operating in Europe and in emerging countries.
- Global Reporting Initiative – a non-profit organization that promotes economic, environmental and social performance, with a sustainability reporting framework that is widely used around the world.
- HEC Paris – The French business school was the first in Europe to create a Professional Chair in "Business and Poverty", sponsored by Professor Muhammad Yunus, who collaborates with Sair da Casca's Action Tank Program and with the European project Progress.
- SDO Moçambique – Company operating in Mozambique, linked to a global consultancy network regarding the development of competencies in teams and organizations.
- SIE – Social Innovation Europe – Sair da Casca has been country partner of the Social Innovation Europe to Portugal, since March 2012, which allows us to access the resources of the European platform and the opportunity to share projects and contribute to recommendations for the development of European Reports on social innovation.
- TheBridge – company focused on the relationship between companies, third sector, governmental entities and international institutions, such as the PNUD.
- Volans – John Elkington's innovation focused business, regarding leadership for sustainability (Future Quotient).

### **National partners:**

- APAN - Portuguese Association of Advertisers – Sair da Casca is the facilitator and expert in the "Communication Responsible" Group.

- APCC – Coimbra’s Association for Cerebral Paralysis – Partnership with Sair da Casca in the development of social innovation and engagement with stakeholders projects, within the European framework.
- BCSD – Sair da Casca develops with BCSD Portugal training workshops, seminars and was chosen by BCSD to facilitate their Reference Group in the Development Focus Area.
- ENTRAJUDA - Protocol to provide consulting services for solidarity projects.
- GRACE – Sair da Casca is a member of this Group, who promotes the development of corporate social responsibility initiatives.
- Ministry of Education and Science - since 1994 the Ministry of Education and Science has participated in its projects and has supported its output.
- SCML – Santa Casa da Misericórdia de Lisboa – Partner of Sair da Casca in the program Programa de Voluntariado Reparar and also a member of the Action Tank Portugal’s strategic Council.
- SEA – Social Entrepreneurs’ Agency – Partner of Sair da Casca in local projects of engagement with stakeholders, in particular, thinking groups on the issues of employment, entrepreneurship and volunteering.
- UNESCO - our partner in the framework of the Decade of Education for Sustainable Development.
- VdA – Vieira de Almeida e Associados – Partner of Sair da Casca as member of the Action Tank Portugal, providing legal support and counseling in the projects developed under the Action Tank .

## AREAS OF ACTIVITY

**We are a company focused on action and results.**

### SUSTAINABILITY MANAGEMENT

The path towards sustainability in business has developed from, the internal management of the social and environmental impact of companies (CSR 1.0, 1995-2005) to integration of sustainability within the strategy and economic model of the company, impacting on products / services (CSR 2.0 from 2006). Based on this approach, we provide strategic thinking - with all associated diagnostics - and in the management and implementation of action plans. Our support is based on a technical and specific component, and through internal training. At this level our support goes from the creation of models of governance for sustainability, to the mobilization and training of employees in various themes, strengthening the appreciation of the commitment of the company. The logic of implementation is focused on results, so that all actions are monitored by indicators to evaluate the success of the implementation and assess its impact. The involvement of stakeholders is the key condition to ensure the success of the plans, which implies a constant feedback.

#### 1) Stakeholders involvement

**We support the definition of strategies to involve stakeholders (the issues, stakeholders, objectives and implementation plan) and put them into action in the field.**

The involvement of companies with the society, and particularly with their stakeholders, is nowadays a crucial aspect of the management in the short, medium and long run, but also a condition to keep its license to operate, and a crucial factor in managing risks. Stakeholders engagement has increasingly becoming a must have, replacing the nice to have approach. In this mindset and approach, the company creates dialogue lines, promotes consultation to identify expectations and establishes partnerships where a participated management becomes effective and real.

We work with companies in the efforts to make them define their strategies and stakeholders' engagement plans. To do so, we identify and map the most critical stakeholders, we perform internal and external consultations, we identify the most relevant aspects and themes for each segment and we define goals and action plan for the targets. To sum up, we define which stakeholders to involve, the aspects and themes to develop, the purpose and the manner to do all this.

**KEY PRODUCTS:** EXTERNAL AND INTERNAL STAKEHOLDERS' CONSULTS | MATERIALITY ANALYSIS ON THE MOST RELEVANT THEMES AND ASPECTS | DEFINITION OF THE STAKEHOLDER ENGAGEMENT STRATEGY | DEFINITION OF THE ACTION PLAN

#### 2) Implementation

**Beyond defining strategies for sustainability issues, we work on the implementation of action plans, focusing in companies' results.**

Once the action plan has been defined, it is necessary to monitor and implement it. Coordinate the implementation and the monitor procedure, requires a precise definition of the actions, including the goals, the target audience, the necessary resources, the partners engagement, communication, among other things. Moreover, it is also very important to define in the beginning, de key indicators to evaluate the success of the actions.

We support the definition of those action plans and their implementation, where we are able to represent the company in all the processes, namely in managing internal and external partners. We also develop specific and technical projects, for example, projects concerning the measurement of the carbon footprint.

**KEY PRODUCTS:** DEFINING ACTION PLANS | IMPLEMENTATION OF THE ACTIONS | MONITORING THE PLAN

### **3) Organizing and building capacity**

**We design, align and make recommendations for sustainability governance, supporting also internal teams and mobilizing them towards these issues.**

It is not always obvious how companies should organize when addressing the issues of sustainability. Between creating an area where they allocate people, keep the implementation at each direction, evaluating the individual performance according to the implementation, create committees, create teams, there are multiple decisions companies can make in order to define their governance model for sustainability. We do an analysis of strengths and weaknesses of the models implemented and we design new proposals for the organization, taking into consideration the company's profile.

After defining the governance model, preparing the teams for their roles is crucial. A more technical training might be needed, or even some actions to create awareness and engagement on the topic.

**KEY PRODUCTS:** ANALYSIS OF THE SUSTAINABILITY GOVERNANCE MODELS | RECOMMENDATIONS TOWARDS CHANGING THE EXISTING MODELS | DESIGN OF NEW GOVERNANCE MODELS FOR SUSTAINABILITY | TRAINING AND ENGAGEMENT OF TEAMS

### **4) Monitoring and reporting**

**We work in the diagnosis that supports economic, social and environmental KPI's monitoring, identifying improvement areas as well as opportunities. We also define a content strategy, develop and finalize the contents for the reporting exercise.**

This exercise is relevant for companies, not only due to the intended final output, but also due to the process itself. A communication tool such as the sustainability report or a simple disclosure of information, is fundamental when it comes down to the process companies are following towards defining what they wish to monitor, the information they want to collect and the relevance of the topics for their stakeholders. The way companies prepare their sustainability report, most of the times, defines the importance that is given to social responsibility and environmental concerns in the future. This in turn, ensures a better management of information and performance of the companies towards those topics, which had previously reflected on.

We support companies in the process of elaborating their sustainability reports and their disclosure of information, by using international guidelines for reporting and focusing a continuous improvement of companies' performance and a growing engagement of their teams on the topic.

**KEY PRODUCTS:** SUSTAINABILITY DIAGNOSIS | MANAGEMENT OF INDICATORS AND MONITOR | ELABORATING THE SUSTAINABILITY REPORT AND/OR ELEMENTS FOR DISCLOSURE

## **SOCIAL INNOVATION**

Over the past 20 years, the contribution of companies to society, beyond its financial performance, has gained more visibility. However, the practices of social responsibility have remained (in general) associated to patronage initiatives, separate from business and sometimes parallel to their own company activity. The area of Social Innovation in Sair da Casca was created to contribute to the construction of ambitious and innovative projects allowing sustainable issues to be incorporated into the heart of company activity. We rely on the principle of stakeholder involvement, which ensures knowledge of their needs and expectations and allows a collaborative approach. For companies, this new approach facilitates their rooting in society and strengthens its license to operate. Projects that are created in this area will contribute to employability, local economic development, training, etc. This addresses the development of new economic models allowing the inclusion of small suppliers, consumers in need, employees and vulnerable populations, etc.

### **1) Internal Social Responsibility**

Sair da Casca supports companies in the creation / management of their internal social responsibility areas, diagnosing the main challenges and developing actions to improve living conditions of employees, thus contributing to a reduction in absenteeism, increased motivation and productivity, talent retention, etc.

### **2) Community Involvement**

Sair da Casca supports companies in the structuring of their involvement with the community developing strategies and action plans utilizing the "essence" of the company, placing their skills at the service of the community. Through a volunteer program, for example, the company can maximize its impact, both internally, with employees (participating in an action) and externally, within the community (they may see a need attended to).

### **3) Social Business**

Sair da Casca supports companies in creating social and inclusive business, from the design of the idea, to the developing of the business and financial model as well as partnerships with critical stakeholders.

### **4) Impact assessment**

Sair da Casca has developed a tool for the measurement of the social impact, in partnership with BCSD Portugal, which allows us to assess the social impact, monetized, of their investments.

## **COMMUNICATION**

Communication is a "historical" area of expertise in Sair da Casca. It was through communication projects that companies began to engage their stakeholders, regarding their concerns in the framework of Sustainable Development issues (health, nutrition, environment, etc.). Many of these challenges were taken as subjects for communication projects aimed at children and youths in order to change behavior patterns and to give new generations the tools necessary to build their future in alignment with the principles of sustainable development. The communication aspect of our projects also represents our commitment at change in behavior patterns and our ambition is to further each projects impacts. Within the ambit of Communication, our projects aim to define their impact on each of the following components: business, consumers / customers, value chain and community.

In Communication the concept of sustainability cuts across all issues - from content to supports to communication.

Sustainability reporting is related to the need for accountability or disclosure of the performance of a company, through a number of tools available in a variety of ways, including training, information and awareness. This communication is differentiated by the kind of public involved.

### **1) Educational Communication**

The younger generations spend most of their day at school. It is also there that they receive the basis of knowledge that will equip these children and young adults to make choices and decide on their future. Companies are increasingly willing to assume their role in Education for Sustainable Development, not only because they have the means to do so, but mainly because they have the knowledge and contents to complement the curriculum in an enriching way. Sair da Casca has developed communication and involvement projects in schools since its inception, always working closely with official entities in order to adapt the program, developed with the client, to the needs of schools and the school community. Regarding this, we developed a Code of Conduct for Communication in Schools, which reflects all our concerns on developing school projects. This code is based on the most recognized national (APAN, ICAP) and international (European Commission) recommendations to communicate at school, and is shared with all our clients, guiding all our work in this area.

**KEY PRODUCTS:** PEDAGOGICAL PROGRAMS | MANAGEMENT OF EDUCATIONAL SERVICES | ACTIVITIES WITH TEACHERS | WORKSHOPS FOR SCHOOLS | SCHOOL CONTESTS

### **2) Awareness and Mobilization**

The purpose of all projects that Sair da Casca proposes to develop is always aimed at changing behavior. Using several tools and strategies, we begin by bringing awareness to the target, adapting the form and content, but always keeping in mind the need to inform and train, to raise awareness.

The other role that communication plays in achieving the sustainability strategy of a company is related to its ability to mobilize around the issues and challenges. It's not enough to just inform. To get a real involvement of the different stakeholders, it is important to mobilize them, demonstrating the importance of communication and action, and establishing common objectives to become a motor for mobilization.

**KEY PRODUCTS:** INFORMATION MATERIALS ADAPTED | MOBILIZATION CAMPAIGNS | PARTICIPATED CONSTRUCTION OF ACTIONS

### **3) Employees Involvement**

The communication of sustainability in the sense of accountability or disclosure of the performance of a company must always have the initial involvement of employees. Without their active involvement and participation, many policies remain just policies, so the implementation of a sustainability strategy should always rely on the internal public. For internal communication, in addition to the difference in language, a huge variety of tools exist, which are adjusted according to the objectives, scale and dynamics of the

company. However, there must always be an information and training function to involve and share in commitments which will then become known to the public at large.

**KEY PRODUCTS:** TOOLS FOR INTERNAL COMMUNICATION | EMPLOYEES ENGAGEMENT ON SCHOOL PROGRAMS | WORKSHOPS FOR EMPLOYEES' CHILDREN

#### **4) Territories of Communication**

Corporate social responsibility politics should have an expression. The construction of a social responsibility strategy consistent with business and operations is the first step. The communication territory of adopted policies should be in total harmony with the overall strategy, and must be applied not just in the company but also in its action field or in its different brands. Defining this territory and plan of action is the aim of our projects, which can then extend to monitoring implementation of the plan.

**KEY PRODUCTS:** COMMUNICATION PLAN IN SOCIAL RESPONSIBILITY

## CLIENTS 2010-2015

Accenture, Administração dos Portos de Lisboa, ANA - Aeroportos de Portugal, APAN - Associação Portuguesa de Anunciantes, ARM - Associação de Restaurantes McDonald's, Banco de Fomento Angola, Banif Grupo Financeiro, BCSD Portugal, Bel Portugal, Bento Pedroso Construções, BES Angola, BIC Portugal, Brisa Auto-Estradas de Portugal, Caixa Geral de Depósitos, Câmara Municipal de Oeiras, Celpa, Cerealis, Danone Portugal, EDA - Electricidade dos Açores, EDP - Energias de Portugal, EPAL - Empresa Portuguesa das Águas Livres de Portugal, Fidelidade - Companhia de Seguros, FSC IC - FSC International Center GmbH, Fundação EDP, Fundação Galp Energia, Fundação Portugal Telecom, Galp Energia, Gestamp Aveiro, H&M, Herdade do Esporão, INCM, Johnson & Johnson, Junta de Freguesia de Marvila, Laboratoires Expascience, Lactogal - Produtos Alimentares, Luís Simões Logística Integrada, Luso Finsa Indústria e Comércio de Madeiras, Modelo Continente Hipermercados, Merck Sharp & Dohme, Multicare - Seguros de Saúde, NAV Portugal, Nestlé Portugal, Novabase Business Solutions, Nutricia, Portucel Empresa Produtora de Pasta e Papel, REN, SANEST - Saneamento da Costa do Estoril, Santa Casa da Misericórdia de Lisboa, Samsung, Siscog, SCC - Soc. Central de Cervejas e Bebidas, Sovena Portugal, Sumol+Compal, Transtejo, UCall, Unicef Moçambique, Universidade de Lisboa, Volkswagen Autoeuropa.

## HISTORY

### 2015

- ⇒ SMARK launch, an exclusive tool of Sair da Casca to measure companies' contribution to society
- ⇒ Sair da Casca joins the Portuguese platform to support refugees – PAR
- ⇒ Sair da Casca is partner in the Conference that took place in November 24 "Investment with social impact – Shared experiences France-Portugal", organized by the economic services of the French Embassy in Portugal, in partnership with CGD and in collaboration with FSI
- ⇒ How to encourage the engagement of citizens? Article by Nathalie Ballan for the Observatory of Caixa Geral de Depósitos Bank, under the project Young VolunTeam, that Caixa created in partnership with Sair da Casca and Entreaajuda. [http://www.revistacx.pt/edicao\\_n\\_20#!11](http://www.revistacx.pt/edicao_n_20#!11)
- ⇒ NOVA VIDA NOVA – volunteer program for the National Counsel of Refugees.
- ⇒ Launch of the game "Journey towards a Better World" in Maputo, Mozambique, with SDO.
- ⇒ Sair da Casca participate in the SEFORIS study, an international research project about social companies, financed by the European Commission.
- ⇒ Sair da Casca was selected by BFA to draw the social responsibility policy of the bank.
- ⇒ Publishing of the study on the contribution of companies for education with the participation of over 100 professors.
- ⇒ Social enterprises in Portugal – Move to action, a workshop on social businesses, that took place in June, under the European project ASII.
- ⇒ The Guide "Social Responsibility in SMEs" elaborated under a GRACE work group, with Sair da Casca supervision. Available at: <https://lnkd.in/eN-Qxdless>
- ⇒ Sair da Casca participated in the II edition of the Best Practices Market – A Showcase of social responsibility projects. A GRACE and Foundation *Manuel António Mota* initiative.
- ⇒ Sair da Casca cofounded the network IBSCN (International Business & Society Consulting Network). This new alliance gathers consultancy companies with a wide range of competencies in stakeholders and communities engagement, market-based solutions to address the issue of poverty and empowerment and evaluation of impact.
- ⇒ Sair da Casca subscribes the Linhas de Orientação para Investidores e Financiadores Socialmente Responsáveis, an initiative by GRAIS – *Grupo de Reflexão para a Avaliação do Impacto Social*.
- ⇒ I&S – Ideias Simples. Ideia de Sucesso da Fundação PT. The I&S is a platform born out of the Action Tank Portugal, supervised by Sair da Casca, and has a number of partners that, step by step and in a simple manner, explain the necessary steps to create or structure a business and then get it online. <http://ideiasimples.sapo.pt/home>.
- ⇒ Nathalie Ballan, Sair da Casca founder, speaks to Laurinda Alves, in Observador Journal, on the sense of mission, educational projects and companies closer to the citizens. In an interview called: *Filantropia empresarial em tempos de crise* (Corporate Philanthropy in a time of crisis).
- ⇒ Sair da Casca develops a project with UNICEF Mozambique about the topic of corporate social responsibility in the country,

## 2014

- ⇒ Launch of the manual "How to mobilize companies for social projects" (GRACE), Sair da Casca participated in the project.
- ⇒ Sair da Casca participated in the Workshop of Initiative to New Leaders of GRACE.
- ⇒ Partnership with ONStrategy partner of the Reputation Institute.
- ⇒ Interviews and clients and partners engagement in the development of the post-20 years strategy. Thank you to all who decided to join us!
- ⇒ 20<sup>th</sup> birthday celebration!
- ⇒ Sair da Casca is a partner of Novabase in the conceptualization and implementation of a tool developed by Novabase which supports organizations in the management and monitoring of their sustainability progress.
- ⇒ Nathalie Ballan is part of Ariane Rothschild fellowship, a network of entrepreneurs and social leaders with interest in change and intercultural dialogues.
- ⇒ Sair da Casca associates to the project LINK2JOBS, developed by TESE - *Associação para o Desenvolvimento* (Development Agency), ANJE - *Associação Nacional de Jovens Empresários* (National Agency for Young Entrepreneurs), Calouste Gulbenkian Foundation, with support of Programa Escolhas (Program Choices).
- ⇒ Workshop at Sair da Casca with students from NOVA SOCIAL CONSULTING CLUB.
- ⇒ Members of the network CONVERGENCES, the first platform for reflection in Europe, focused on establishing partnerships between public entities, companies and third sector.
- ⇒ Sair da Casca was chosen by Rock in Rio as "sustainability expert".
- ⇒ Launch of the 20 years celebration of Sair da Casca, featuring a plan with 20 actions targeting our stakeholders, collaborators, clients and partners.

## 2013

- ⇒ Change in the shareholder structure: Cláudia Tapadas e Marta Vian Santos, Diretora Executiva e Communication Manager respectively, acquired company's shares.
- ⇒ Sair da Casca invests in the launch of a start-up - **Finance For Social Impact**, dedicated to the financing of social projects, and maximization of their impact.
- ⇒ First workshop with BCSD to present a social impact tool.
- ⇒ New edition of the study on companies' donation, with support of Informa DB.
- ⇒ End of the project Social Business in Progress, with the publishing of a manual and recommendations - in Portugal the social business project of APPC begins its incubator phase.
- ⇒ Two new members, PT Foundation and SCML, joined the Action Tank Portugal, which is launching a blog on inclusive businesses, in order to promote the sharing of ideas and resources: [www.actiontankportugal.net](http://www.actiontankportugal.net)
- ⇒ The educational program project Missão Up | Unidos pelo Planeta is the winner of the 2013 edition of the Energy Globe Award in Portugal.
- ⇒ Sair da Casca gives its first steps in Mozambique, thanks to the partnership with SDO Moçambique, to create an innovation and social responsibility area. Several workshops for companies, media and NGOs were developed and an agreement with the media Group SOICO to create contents on sustainability.
- ⇒ First sustainability report in Angola, for BESA Bank.
- ⇒ "Brincar, Inovar e Colorir" is the name of the most recent educational project by BIC which, in partnership with Sair da Casca, will bring creativity and recycling issues to over 270.000 students from primary schools all over Portugal.

- ⇒ Debate *Tertúlia das Entradas sobre os grandes temas de 2013: Será a sustentabilidade solúvel na crise? Ou teremos a criatividade e resiliência necessárias para construir o "nosso futuro comum"?*
- ⇒ Sair da Casca is part of the strategic Council of BIS – *Banco de Inovação Social da Santa Casa da Misericórdia de Lisboa*, representing the Action Tank Portugal.
- ⇒ Becomes member of GRACE – Grupo de Reflexão e Apoio à Cidadania Empresarial.
- ⇒ Sair da Casca publishes a disclosure of information, which represents an extra mile, in its journey towards transformation.

## 2012

- ⇒ Sair da Casca's new image, presents its new position "sustainability intelligence in action."
- ⇒ New website.
- ⇒ The Future Quocient, by Volans, is translated into Portuguese by Sair da Casca.
- ⇒ Partnership with the **ARAKU MOZAMBIQUE Project**, under Naandi's leadership (one of the largest Indian NGOs) and Manoj Kumar.
- ⇒ Several initiatives, conferences and seminars regarding inclusive business and social business in developed countries and the PALOPS.
- ⇒ Sair da Casca becomes **COUNTRY PARTNER for SOCIAL INNOVATION EUROPE**, an initiative of the European Commission.
- ⇒ Nathalie Ballan joins the European Union's Expert Group for Sustainability in Small and Medium Enterprises.
- ⇒ Sair da Casca wins the development of **Volkswagen Autoeuropa's** first sustainability report.
- ⇒ Action Tank Portugal is presented in Paris during the general assembly of the *Entreprise et Pauvreté* French movement.
- ⇒ Third edition of the study on business and community.
- ⇒ Signing of the Portuguese Association of Announcers' (APAN) **Commitment for Responsible Communication**.
- ⇒ Partnership with Volans, **John Elkington's** company, the sustainability "guru".
- ⇒ First consulting Project for a university.
- ⇒ Action Tank Portugal's first anniversary bringing together ten organizations, with the mission of leveraging social and inclusive business programs in Portugal
- ⇒ AZAO Partnership, a French consulting firm specialized in inclusive businesses and products BOP.

## 2011

- ⇒ Publication of Sair da Casca's study on business and community, in a leading generalist magazine **Visão Solidária**, dedicated to Solidarity.
- ⇒ **New approach on the implementation of sustainability strategies**, focused on action plans and monitoring
- ⇒ Sair da Casca is the consultant specialist selected by **APAN** for the **Working Group on Responsible Communication**.
- ⇒ **Sustainability expert** of the **Greenfest** – largest Portuguese festival on sustainability.
- ⇒ First sustainable awareness projects in universities throughout the country

- ⇒ Sair da Casca is the consultant selected by BCSD Portugal for the Reference Group in the Development Focus Area – GRAFD.
- ⇒ Partnership with Santa Casa da Misericórdia for the REPARAR project.
- ⇒ Fourth edition of Engagement Rating Ibérico with the adoption of new methodology and a greater involvement of the organizations.
- ⇒ **Launch of the European project “Progress”**, to develop models of professional integration in institutions dedicated to disability. The project involves four European countries and the French business school HEC as an evaluator.
- ⇒ Launch of **Action Tank** with BCSD Portugal to leverage *social business* and *inclusive business* in Portugal.
- ⇒ *Workshops* for journalists of “Grupo Diário Económico” on Sustainable Development.
- ⇒ Sair da Casca presents its projects in more than 20 conferences and seminars.

## 2010

- ⇒ **Meeting with Prof. Muhammad Yunus**, Nobel Peace Prize (2006,) focused on social business.
- ⇒ **Launch of the research area in Life Cycle Assessment of Goods and Services.**
- ⇒ **Results presentation of the Engagement Rating Ibéria.**
- ⇒ **First carbon footprint rating of the bank sector.** The groundbreaking study, in partnership with the French Utopies consultant, addresses the issue of carbon footprint of financial institutions by **examining the environmental impact of companies that belong to its investment portfolio.**
- ⇒ First review of compliance with AA1000 SAS, in partnership with the English think tank AccountAbility.
- ⇒ **Organization of the International Conference “Business and Poverty - the social role of companies,”** during which was launched the **first national study on companies investment in the community.** The role of business in combating poverty was the subject of a research work developed by Sair da Casca and was associated with the European Year for Combating Poverty and Social Exclusion. The meeting in which the study was presented had the High Patronage of the Presidency.
- ⇒ **Sair da Casca recognized as a Social Investor by the Social Stock Exchange (BVS).**

## 2009

- ⇒ State of the art study in Responsible Communication, with the publication of the **first Eco-communication Guide** in Portugal.
- ⇒ **Implementation of the first workshop, in Portugal, dedicated to Responsible Communication.**
- ⇒ Implementation, for the second consecutive year, of the Accountability Rating Portugal, accompanied by the first Spain Accountability Rating and Iberian comparative study.
- ⇒ **Protocol with ENTRAJUDA** to provide consulting services for solidarity projects.
- ⇒ Seminar on “Sustainability Assessment - Dow Jones Indexes” in partnership with SAM aimed at public companies (MOPTC) and private companies
- ⇒ **Seminar on “Responsible Communication for Children”** in partnership with APAN.
- ⇒ Sair da Casca’s 15th anniversary, celebrated with the launch of the new website.

## 2008

- ⇒ School Project “EDP – O Ambiente é de Todos” (an environment education project) was nominated by the Energy Globe Awards, **as one of the best three educational projects worldwide.**

- ⇒ First edition of the Accountability Rating Portugal to assess the transparency of companies, in partnership with AccountAbility and EXAME Magazine.
- ⇒ **Portuguese Water** Museum web site, developed by Sair da Casca, awarded by the International Water Association in the category of "Best Activity or Program for Water Protection"
- ⇒ Launch of the workshop "Stakeholders: Involve and communicate" in partnership with BCSD Portugal.
- ⇒ Project "Our commitment", developed by Sair da Casca for "Sociedade Central de Cervejas" was nominated as one of the top ten of the European Business Awards, in the award category of Corporate Social Responsibility.
- ⇒ Sair da Casca joins the Business & Biodiversity initiative and is committed to contribute to "Halting the loss of biodiversity by 2010".
- ⇒ The national team of Respons&Ability Project launch "Disability and the company: to recruit, integrate and win" workshop. Sair da Casca is a Project Partner.
- ⇒ Sair da Casca develops new skills and invests in the areas of climate change, biodiversity and due diligence.
- ⇒ Expertise in the transport sector with strategy development projects for several companies: Luís Simões Group, ANA - Airports of Portugal, APRAM - Ports Administration of the Autonomous Region of Madeira, APL - Port of Lisbon, Transtejo / Soflusa and NAV Portugal - Air Navigation of Portugal.
- ⇒ Team expansion with the reinforcement of new skills.

## 2007

- ⇒ Rui Loureiro (formerly PricewaterhouseCoopers) appointed Director-General of Sair da Casca.
- ⇒ Establishment of a methodology for the integration of sustainability through the involvement of internal stakeholders, applied in Central and Beer Company and the Group Caixa Seguros.
- ⇒ **Partnership with Utopies**, the European pioneer in the field of sustainable development consulting.
- ⇒ Partnership with Sustainability Portal - VER - established by ACEGE (Association of Christian Entrepreneurs and Managers).
- ⇒ Collaboration with BCSD Portugal for the "Annual Conference on Sustainable Construction".
- ⇒ Lectures on communication in the perspective of sustainability in Post graduation courses "Management of Organizations and Sustainable Development" of Escola de Gestão Empresarial - School of Management.

## 2006

- ⇒ Partnership with Enablon, market leader in software management sustainability indicators.
- ⇒ Launch of the **workshop "How to Prepare a Sustainability Report"** in partnership with BCSD Portugal and Enablon.
- ⇒ Development of several studies on social responsibility, including consultation and mapping of stakeholders for customers such as Auchan and Sociedade Central de Cervejas.
- ⇒ **First seminar on "Sustainable Marketing"** in partnership with BCSD Portugal.
- ⇒ *Eco-design* – creation of a "sustainable" exhibition stand for Auchan built from the reuse of crates and refuse, in order to raise consumer awareness of sustainable development.
- ⇒ A project ensuring from the EQUAL Community Initiative - **Sair da Casca is once again partner of the EU**. Through the project "respons&Ability" coordinated by the APPC.

## 2005

- ⇒ Development of the study for **FIPA "The Food Industry and Healthy Lifestyles"**, included in the project "Vitality XXI - The Food Industry for a healthy life. The study was unprecedented in Portugal and in Europe, as it was the first extensive sector consultation of stakeholders, gathering as a result all the best performances in industry.
- ⇒ **Sair da Casca receives "Effectiveness Award 2005"** organized by the Portuguese Association of Advertisers in the category of "Efficacy in Social Responsibility", with the project "**Apetece-me**" (part of the Healthy Kid's Global Programme), Nestle.

## 2004

- ⇒ Launch of the first training and awareness workshop for Portuguese business managers on corporate social responsibility and sustainability, in partnership with BCSD Portugal.
- ⇒ **Sair da Casca is awarded the First Prize for "Sustainable Marketing" by the Portuguese Association of Marketing Professionals for the study on "Perceptions of Social Responsibility in Portugal"**
- ⇒ Joining "The Global Compact" a United Nations Organization.
- ⇒ Sair da Casca becomes a partner of the European Commission for the project EQUAL.
- ⇒ Publication of the first study on the "Social Responsibility Perception in Portugal", an initiative under the High Patronage of the Presidency of the Portuguese Republic.

## 2001 > 2003

- ⇒ First Portuguese web site on corporate social responsibility, distinguished for "The Best Website of the Year 2003" by the Portuguese Association for Corporate Communication.
- ⇒ Development of a series of projects on training and internal communication during the changeover to the euro, particularly training all checkout assistants of Modelo Continente hypermarkets and all insurance companies of the Caixa Geral de Depósitos Group.
- ⇒ Sair da Casca was **recognized as a public utility company by the Ministry of Education**, for the quality of their projects, and for its concern regarding resources for schools in need.

## 1995 > 2000

- ⇒ Sair da Casca develops the campaign "Safe Nutrition: Responsible Industry, Consumer Awareness" for the Portuguese Agro-Food Federation (FIPA). An awareness project for employees of the Food industry on hygiene and food safety. Due to the methodology of cascade training, after a phase of listening to employees, 80,000 employees were trained in six months.
- ⇒ The nutrition education program for the general public - "Food and Health Program" of ARAP (Portuguese Sugar Refiners Association) - selected by the Food and Agriculture Organization (FAO) as one of the world's reference projects in health education, regarding partnerships with the business sector. As a result of this project, Sair da Casca held its first stakeholders consultation and outlined its first stakeholders involvement project.
- ⇒ Sair da Casca edits the Journal "Sair da Casca", a free newspaper (sponsored by our clients) sent to 100.000 pupils in primary education and their teachers.
- ⇒ In response to the recommendations of the European Commission and in order to help our clients in the definition of socially responsible actions in the school, Sair da Casca developed the first code of best communication practices in Portuguese schools

## **1994**

- ⇒ Sair da Casca was founded.
- ⇒ Sair da Casca received the ILE Award as an Innovative Company, from the European Union.

## **TEAM**

### ***PARTNERS***

#### **André Almeida**

André's professional life ran, and still runs, in different worlds from the one he encountered in Sair da Casca. It includes many years of experience in the pharmaceutical industry, where he held several positions in a family-oriented company, the Group JABA. Apart from other functions, he was, from 1999 to 2006, CEO of the Group, and through this, Vice President of APIFARMA, The Portuguese Pharmaceutical Industry Association and Chairman of Euralliance Farma, a European Economic Interest Group. These were years of intense experience at an association level, both nationally and internationally, giving him a practical view of the needs and difficulties of the interaction between businesses.

Along the way, came Advertising and Communication, spending five years at Euro RSCG Portugal, which he left as CEO in 1999. The development and implementation of Integrated Communication between distinct areas of EURO RSCG was a huge management challenge at a time when the concept made a difference.

In 2006, André founded Winicio, a Marketing and Communication Company and at the same time embraced the challenge of Sair da Casca. Sair da Casca's project relies on the use of communication as an essential channel for disseminating messages and concepts, among the different stakeholders. Sair da Casca's skills were greatly enhanced by the connection between it and Winicio, giving its developing projects added strength.

In 2009 he embraced another project, taking responsibility for administration in Innovagency, a consulting and Development Company on digital platforms. This step was the result of a strong conviction of the essential role of digital platforms, with increasing importance, in the relationship between companies and its stakeholders in all its economic activities.

All this business activity is generated in a spirit of cooperation between complementary activities, although business objectives are different, and with the perspective of sharing opportunities and resources.

After all, in today's world, resources are scarce even at the enterprise level, and business development requires a vision of greater business interaction, under penalty of becoming almost impossible its growth and development.

## Nathalie Ballan

Nathalie started to plan the outline of Sair da Casca in 1993, shortly after having arrived in Portugal. The idea was to conciliate the experience she had gained over the years as a volunteer in NGOs, with skills acquired in the world of journalism and communication.

Sair da Casca emanates from the belief that companies are a formidable motor for change and that a socially responsible action can cause a "virtuous circle" crucial to success in business.

Thanks to the open mind of national companies such as Modelo and Continente, Mimosa, Portuguese Sugar Refiners Association and of Procter & Gamble, the first projects were born, all related to education, in a corporate citizenship perspective. Nathalie led the first stakeholder consultations held in Portugal, introducing the expectancy of their institutional stakeholders to ARAP and Modelo and Continente on controversial topics, at that time, such as sugar consumption or consumer education. These first consultations led to stakeholder involvement in projects, which helped build bridges between the business world and NGO's

It was from this point that Nathalie began to form Sair da Casca's own methodology always analyzing the expectations of stakeholders, either in a risk management perspective, or in an opportunity perspective. As the issue of social responsibility grew, Nathalie accompanied the first steps of large national companies such as Auchan, BES, Caixa Seguros Group and the Sociedade Central de Cervejas. In 2007, she began to do a research relating to communication and responsible consumption that resulted in a series of initiatives, such as the preparation of the first guide on eco communicating, of a workshop on responsible communication, and more recently a study for APAN on the practices of its members.

Over the last few years, Nathalie has led several projects relating to education and inclusion, as well as developing a methodology for companies moving from sponsoring charities to strategic philanthropy. She developed, together with her team, a project for research and debate "The Role of Business in Society", in 2010. This was the first study made in Portugal on the investment of business in the community. With the support of BCSD Portugal, Sair da Casca was also responsible for bringing to Portugal Nobel Peace Prize winner, Professor Muhammad Yunus and for initiating a task group of several partners whose primary goal is to leverage social business and inclusive business in Portugal.

## **Cláudia Tapadas**

Appointed Executive Director in 2011, Claudia accompanies projects mainly related to stakeholders involvement, and in 2009 led the first national project of gap Analyses with AA1000 APS, for EDP, in partnership with the NGO Accountability. Claudia is mainly involved in the strategic phases of development, in mapping and listening to stakeholders, in employee mobilization and governance of sustainability (Accenture, Caixa Seguros e Saúde, Portugália Restauração, Sociedade Central de Cervejas etc.).

In terms of research, Claudia works on responsible communication issues, whether in terms of conformity or in corporate performance communication, and was responsible for the task team of APAN (Portuguese Advertisers Association) created in 2010. She participated in the preparation of the Eco Communication Guide (Sair da Casca 2009) and more recently wrote the Good Practices for Sustainability Communication in Organizations Guide for the APCE (Portuguese Business Communication Association). Claudia has a degree in Business Communication and attended the Program Management and Leadership AESE - School of Management and Business.

## **Marta Vian Santos**

Marta has a degree in Organization and Management from ISCTE and she began her career as a marketing manager in an information technology company where she coordinated public relations, promotion of products, events, sponsorships, etc.

In 2004, Marta founded her own company, always in the marketing area but targeting an area she has a special affection for: children. The mkids, specializing in events and communication campaigns, was an opportunity to explore the best way to interact with children. In 2008, Marta accepted Sair da Casca's challenge: to strengthen the area of communication for children and youth, an area that is becoming increasingly relevant due to the current commitment of many businesses to sustainability.

Marta's mission and that of her team is to support companies in their desire to contribute to the education and training of the youngest, developing educational projects inside and outside the schools - ranging from pre-school children to university students.

Today Sair da Casca's role in communication is increasingly geared to raising awareness and mobilizing the general public and consumers, and in positioning brands with reference to marketing and communication.

## **FOR MORE INFORMATION**

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