

## Research Article

# Assumptions of Social Management in the Brazilian Perspective: A Parallel with International Approaches

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## ABSTRACT

Social management is a broad multidisciplinary field; thus, it requires consensus among scholars. This paper responds to two questions: What elements and categories are prioritized in social management studies by Brazilian scholars? Is there novelty in the elements of SM at the Brazilian approach or it is a superposition with other international perspectives? The methods were lexical analysis, descending hierarchical classification techniques, correspondence analysis, and similarity analysis. The hierarchical clustering of elements extracted from the literature from 1990 to 2019 reveals that the field of social management has six dimensions and originated from previous studies about social participation, governance, and others. Despite the criticism on the concept, there is consensus among Brazilian authors; however, few new ideas emerge, showing a slow growth in the field, besides a low internationalization level. The advance of the praxis is minimizing the level of abstraction; Brazilian scholars defend the triad society, state, and market, but their studies focused more on state and society. On the contrary, international studies recognized the role of firms in social management. The differentiation of the Brazilian perspective of social management is a cognitive citizenship, educational and pedagogical process.

**Keywords:** social management; categories; descending hierarchical classification; IRAMUTEQ

**JEL Code:** M14, M100, H7

## INTRODUCTION

The field of Social Management (SM) evolves both theoretical and methodological baselines and experimental procedures as well. Social Management uses different approaches; some are an evolution of governance systems toward social governance (Reddel, 2004), others a mix of social activism and participative govern (Larner & Craig, 2005; Terziev, 2018). On the one side, Brazilian studies conceptualize SM in many ways, using a variety of practices, approaches, and definitions (Pinho & Santos, 2015a; 2015b); thus, there is no consensus around the definition of SM in the literature (Guerra & Teodósio, 2015).

On the other side, the international perspective considers SM as any practice of social management, related to aspects such as management of employees and their families in the firm (Tuininga, 1990), occupational health management of workers (Baranski, 2002), neighborhood management (Babenko, 2013), the process of social exchanges (Inzerilli, 1990), community activism (Reddel, 2004), social policies (Terziev, 2018), social sustainability (Huq, Chowdhury, & Klassen, 2016), and so on.

Brazilian scholars dedicated attention to SM, creating a theoretical stream that analyzes the dialogical management process in which the decision-making authority is shared among the participants of the social action. From this point of view, SM can occur in any social system, i.e., public, private, or non-governmental organizations (Offredi, 2012; Pimentel, Teixeira, Araujo, & Teixeira, 2011). Tenório's theoretical contributions are the primary sources supporting the Brazilian perspective for SM. The followers improved the concept of SM through a plurality of categories such as deliberative democracy, dialogic process, emancipation, public sphere, well-understood interest, intersubjectivity, rationality, solidarity, sustainability (Cançado, Tenório, & Pereira, 2011; Cançado, Pereira, & Tenório, 2015a). However, the SM concept of the Brazilian theoretical stream has still a low level of internationalization.

Besides the international perspective, the analysis of Brazilian empirical experiences typified as social management comes from several areas of activity, emphasizing the multi-disciplinary characteristic (Araújo, 2012), and the interdisciplinarity (Fischer et al., 2006). Moreover, the analysis of cases of social management uses the concepts of the public sphere (McLaughlin, Osborne, & Ferlie, 2002a; Schommer & França, 2010), private sphere with integration of corporate social responsibility (Vitolla, Rubino, & Garzoni, 2017), social sphere (Crowe, 2013; Araújo & Bouldosa, 2013), territory of citizenship (Fischer, 2012), solidarity economy (Eidelwein, 2009; Loh & Shear, 2015), social strategic management (Cançado, Villela, & Sausen, 2016; Porter & Kramer, 2011), and so on.

Although the SM received national and international contributions from several areas of knowledge, there is a lack of research in the field regarding three aspects. Firstly, the development of standard techniques to analyze the effectiveness of SM practices, as measurement model or indicator systems (Oliveira, Bermejo, Pereira, & Barbosa, 2019). Secondly, studies understanding if the field is a new model of management and offering categories and variables of analysis in a

more objective way (Aguiar-Barbosa & Chim-Miki, 2020). Thirdly, studies to compare the Brazilian proposal for social management with similar approaches in the international context.

The variety of categories used by scholars creates a lack of consensus surrounding the concept of SM. Due to this, the current study examines two following questions: (a) What elements and categories are prioritized in social management studies by Brazilian scholars?; and (b) Is there novelty in the elements of SM at the Brazilian approach or it is a superposition with other international perspectives? Thus, to address these questions, the current research aimed to determine the categories of study on social management and the hierarchical classification of its elements from Brazilian scientific publications of the field.

The research used quantitative methodologies to the analysis of qualitative data extracted from a sample of 73 scientific papers published during 1990-2019 in the Capes periodical database. The analysis carries out a lexical analysis using techniques of descending hierarchical analysis (DHA) and correspondence factor analysis performed via IRAMUTEQ software and its interface with R software. In addition, we carry out lexical analysis techniques to perform the degree of similarity method, allowing verifying the categories and connections among the elements of social management. This study is justified because the social management paradigm needs to be consolidated; therefore, this research seeks to overcome research gaps in the field.

## THEORETICAL BACKGROUND

The Brazilian social management approach is still in consolidation process as a field of scientific knowledge, although its studies started about two decades ago (Cançado & Rigo, 2014). The diversity of concepts and categories creates conceptual divergences and inconsistencies culminating in criticism (Araújo, 2012; Justen, Moretto-Neto, & Garrido, 2014; Pinho & Santos, 2015a; 2015b). Nevertheless, the criticism does not reduce the relevance of the theme to the area of management. Indeed, the discussions on social management in Brazil started in the 1990s (Tenório, 1998) in order to take the concept to a field with its theoretical perspective (Fischer, 2002a). As a perspective, it was consolidated in practice and gained visibility among Brazilian scholars by empirical studies (França, 2008; Pinho, 2010). The scholars highlighted social management as a new theoretical frontier, and as a new management model emerging from a dialogical process with the protagonism of society (Boullosa, 2009; Hernández, 2016).

França (2003) argues that "... the term social management suggests that, in addition to the state, the management of social demands and needs can take place by society itself, through its most diverse forms and mechanisms of self-organization, especially the associative phenomenon" (França, 2003, p. 3). In parallel to that, international studies also focus on these same conditions, but using different terminologies. For example, social activism is an effort to empower the community and citizen groups to manage issues of social exclusion and social cohesion at the society level (Larner & Craig, 2005; Reddel, 2004).

Other factors defended as characteristics of social management are participation, deliberative citizenship, and the inversion of the role of state-society / capital-labor to society-state / labor-capital (Tenório, 2005). These assumptions are similar to the governance theories, which is a participatory system considered a new style of government, legitimized by the people, and different from the hierarchical control model, characterized by a greater degree of cooperation and interaction between state and non-state actors incorporated in a joint public-private decision network (Mayntz, 2000).

The mechanisms of self-organization and association provided for the social management, aligned to the localism of Porteous (2013), refer to a change of power and resources from centralized and top-down governments and decision-making structures to give back democratic and collaborative community structures. These characteristics also lead the studies of SM to a focus on social leaders who are actors of social changes and capable of generating community engagement (Crowe, 2013; Koster, Vos, & Van Der Valk, 2019).

The range of empirical studies associated with SM by Brazilian academics includes cooperatives, social incubators, participatory governance models in neighborhoods, empowerment and social participation activities, NGOs, and others. These programs adjust as the so-called social actions or social policies of Terziev (2018), or models of social governance by Reddel (2004), in which are themes discussed in the international literature. The debates on social management highlight its multidisciplinary character (Marinho, Cançado, & Iwamoto, 2019). However, França (2008) argues that such concept was occasionally used in a general and trivial way, because “everything that is not traditional management is currently seen as social management” (França, 2008, p. 27).

The question remains: On what basis does social management claim differentiation as a management model? The defenders of this theoretical line legitimize the importance of the heterogeneity of the social management field, stating that the construct’s academic trajectory stream comes from different theoretical perspectives (Maia, 2005). Therefore, this current theoretical review provides a comparison of different approaches to the proposed social management paradigm (See Figure 1).

SOCIAL MANAGEMENT IN THE BRAZILIAN PERSPECTIVE	↔	INTERNATIONAL SIMILARITIES
CHARACTERISTICS AND FOCUS		CONCEPT AND FOCUS
<p><b>Deliberative democracy</b> Decision-making in the so-called new public sphere.</p>	↔	<p><b>Localism</b> Movement of power and resources away from centralized top-down government and decision-making structures to give back democratic and collaborative community structures.</p>
<p><b>Dialogicity</b> Decision-making based on dialogue.</p>	↔	<p><b>Participative management</b> Refers to the involvement of stakeholders in decision-making by asking all members to think in a strategic and co-responsibility way to improve the organization or society.</p>
<p><b>New public sphere</b> Locus and essential condition of social management. Place where private people meet in a public space in order to decide on their needs and future.</p>	↔	<p><b>Modernizing government</b> Reframed policy process based on notions of inclusion and local knowledge rather than on pure government function. A new deal for communities, national strategy for neighborhood renewal, anti-poverty strategies and regional development agencies become key institutional ground for addressing social exclusion at central, regional, and local spheres of government.</p>
<p><b>Emancipation</b> Appropriation of individual potential. Mainstream of the social management. Citizen empowerment.</p>	↔	<p><b>Community activism</b> Efforts to empower community and citizen groups and manage issues of social exclusion and social cohesion at the society level.</p>
<p><b>Interest well understood</b> It starts from the premise that collective well-being is a precondition for individual well-being.</p>	↔	<p><b>Social governance or 'new social policy'</b> Based on targeted welfare benefits and individual responsibility to reduce the social exclusion and focused on embracing non-state actors and 'joined-up' government.</p>
<p><b>Intersubjectivity</b> Capacity of individuals to understand the subjectivity of the other through communication between them.</p>	↔	<p><b>Social leadership</b> A social learning and discovery process, which becomes a way of engaging communities in fundamental value and culture shifts through posing the difficult questions communities would rather avoid.</p>
<p><b>Solidarity</b> Mutual interests and duties, commitment to each other, social cohesion of the group.</p>	↔	<p><b>Active social programs</b> Transition from the traditional to the innovative model of social development through social programs based on creativity, partnering within the program, the delegation of auxiliary functions, collaboration, and widespread public participation of the population in the implementation of the programs.</p>
<p><b>Sustainability</b> Condition of latent continuity for social well-being.</p>	↔	<p><b>Social sustainability</b> Avoiding social failures with adverse impact, such as child labor or loss of life; and improving employee and community health and welfare, besides the environmental.</p>
<p><b>Substantive rational action</b> Economic dimension must be integrated and balanced with the others, enabling the development of both capital and human potential, society/nation project, based on cooperation and capable of facing exclusion as a process.</p>	↔	<p><b>Social management philosophy</b> It explains change dynamics by integrating social and economic dimensions within the corporate framework considering that the enterprise has a twofold role that is both economic and social; firm's purposes must synergistic respond to the stakeholder's expectations because the economic, social, and competitive aims are closely interconnected.</p>

Figure 1. Overlap of the characteristics of the social management in the international literature

Previous studies analyzed the categories of SM. For instance, Cançado, Tenório, and Pereira (2011) suggested three categories: public interest; public sphere; and social emancipation. Besides, Pimentel and Pimentel (2010) proposed six principles for social management: (a) the collective interest of a public nature as an objective; (b) the public interest as a guide to values; (c) subordination of instrumental logic to a deliberative decision-making process; (d) organized civil society as a protagonist; (e) participatory, dialogical, consensual process; and (f) partnerships and intersectoral networks.

The characteristics of social management proposed in the Brazilian perspective found some degree of overlap in different theoretical perspectives from international studies (Figure 1). It is noticeable that social movements such as social programs and activism become the way of implementing social management. Terziev (2018) points out that the conduct of relevant social policies that reflect the interests of stakeholders and society are irreversible social dynamics in the current environment of society.

Besides, new forms of public government have also been the subject of study for decades, including the new public government (McLaughlin, Osborne, & Ferlie, 2002b), which seeks citizen participation in decisions, transparency, and communication. Governance models also have divided into corporate governance (McManus, 2008), public governance, global economic and social governance (Ocampo, 2010), social governance (Reddel, 2004), and achieved levels of community governance (Bowles & Gintis, 2002) and, more recently, cyber governance (Raza, Kausar, & Paul, 2007; Creemers, 2017). In all these contexts, the goal is to reduce asymmetries, improve the participation of all in decisions, empower the citizens, and legitimate the sustainable development by society as well. Social management in the Brazilian perspective claims to differentiate itself from governance models because it is not conducted by the public authorities, instead it occurs in the new public sphere, which is the space in which society can decide on its future. However, the line of differentiation is quite tenuous.

Social management brought together different aspects of its concept. Yet, its operationalization follows paths of social actions, but it is not always capable to meet all the characteristics proposed in its concept, which led to the emergence of research groups with different perspectives of studies. Peres and Pereira (2014) synthesize these perspectives in four different schools of thought: the Frankfurtian critique, the management of interorganizational social development, the Puquian, and the public societal. Such schools of thought consider studies based on similar theoretical approaches, researchers' affiliations, or singularities in the analysis.

The Frankfurtian critical approach is evidenced through the research by Cançado, Pereira, and Tenório (2015b), defining social management as a process of collective decision-making without coercion as well as sustained by dialogism, participation, and transparency. It proposes the emancipation of the participants of the action, maintaining many of the characteristics that are similar to concepts traced in international literature, such as the models of governance and new public government (McLaughlin et al., 2002b; Pardo-del-Val, Martinez-Fuentes, & Roig-Dobón, 2012; Reddel, 2004).

Next, the management approach of interorganizational social development has the leading exponent Tania Fischer, and SM represents the management of social development as a process in which it is stimulated by organizations working together, co-located or collaborating by interorganizational networks (Fischer, 2002b). Its approach is similar to community governance (Bowles & Gintis, 2002; Reddel, 2004), which are efforts empowering groups of citizens and managing issues of social exclusion (Scott, 2000). In addition, it provides a social cohesion in networks of actors at the level of society with the identification by government agencies of partnership managers and social entrepreneurs as new types of network policy.

In sequence, the Puquians approach of SM focuses on the third sector and social movements (Dowbor, 1999a; Pacheco, Silva, Moretto-Neto, & Michels, 2012; Tenório, 1999). It was titled as Puquian approach due to the many works developed at the Pontifical Catholic University, for instance, Wanderley and Raichellis (2001), Dowbor (1999a), among others. Finally, the societal public approach emphasizes the debates about the Paula' (2005) societal model. It analyzes the public management practices based on society participation diverging from the neoliberal management model adopted in 1980 (Peres & Pereira, 2014). These approaches have elements of social activism (Larner & Craig, 2005).

According to Peres and Pereira (2014), the Boaventura Sousa Santos' ideas about democratizing democracy influenced and permeated the four schools of thought of social management. Certainly, the schools focused on the following three pillars of social regulation in Western modernity: society, state, and market (Wanderley & Raichellis, 2001). This assumption is further developed in the approach based on the concepts of societal public administration, which points out to a new reformist paradigm in which the state must become a component named state as a new social movement (Paula, 2005,) or the modernizing government (Reddel, 2004).

The social development management school in which is conducted by interorganizational entities also recognizes the need for a new administration, including the public sphere. However, it is focused in the formation of cooperation networks to achieve the social management assumptions. In contrast, the Puquian school is turned toward social inequalities, influenced by Kliksberg in the Latin American context (Tenório, 2009) and defended for following four dimensions of social management: access from social areas to centers of power, internal coordination of the social field, participation, and network articulation (Peres & Pereira, 2014).

It seems reasonable to highlight that each school of thought of SM is directed to specific points such as new public management, interorganizational networks, or social movements. The schools seek to bring a practical idea to the concept of SM, generating the main differences among them. However, the underlying assumptions of SM are derived from the mainstream following the Frankfurtian critical theory. Such heritage creates a similarity among the schools of thought. It means that all the schools focus on collective decision-making without coercion and based on understanding; on adopting the transparency as a value and intelligible language as a norm; and on the emancipation of human beings as the highest pursued value (Oliveira, Cançado, & Pereira, 2010).

Another perspective crossing all approaches of the theoretical and conceptual framework of SM comes from Habermas' contributions based on deliberative citizenship and communicative action (Habermas, 1984). Considering this point of view, SM is a language-dependent behavior, thus from this relationship emerged the awareness of a dialogical, transparent, participatory, solidarity, and emancipatory conduct, i.e., the attributes of SM (Caçado, Pereira, & Tenório, 2015b; Oliveira, Caçado, & Pereira, 2010; Tenório, 1998).

The multidisciplinary of the concept is confirmed within this discursive logic insofar as the SM research was conceptually operationalized by several areas such as societal public management (Guerra & Teodosio, 2012), managerial public management (Freitas, Freitas, & Ferreira, 2016), public policy management (Tenório, 1999), strategic management (Caçado et al., 2016), social work, self-management understood as the participation of decision-making agents (Caçado, Rigo, Iwamoto, & Pinheiro, 2019), and so on.

Synthesizing this discussion, SM is a growing field of scientific knowledge that brings together different and convergent theories at the same time. Due to its interdisciplinary behavior (Leite & Andrade, 2013), SM requires a dialogical and transparent manner, in order do not restrict both the development of its field of knowledge and the new innovative practices (Caçado et al., 2011). However, Oliveira, Bermejo, Pereira, and Barbosa (2019) highlight that an understanding of the general context of MS is necessary for the knowledge of key terms in literature such as civil society, public sphere, communication flows, deliberative citizenship, and alternative knowledge.

A consensus among the SM scholars is a process of mediating among the state, society, and market to identify and propose solutions to societal concerns (Caçado et al., 2015a). Therefore, it is a management process whose practice is related to deliberative citizenship and the management of aspects of society. In addition to this view, SM seeks to be a new theoretical field, and thus, understanding its elements allows its use as a mechanism for managing social processes. In face of this, our research aims to contribute to a hierarchical consensus of the SM categories, analyzing its concept and variables.

## METHODOLOGICAL ASPECTS

The understanding of the intellectual structure of a scientific field allows building explanatory models of the central measures with its determinants and variables. From this, the knowledge area starts a process of theoretical maturation and further the elaboration of management tools useful for practitioners. One of the paths to achieve this level is using relational analysis techniques such as meta-analysis of scientific text data (Koseoglu, 2016). The current study proposes a type of systematic literature review using a computer-assisted qualitative data analysis software – CAQDAS (Rademaker, Grace, & Curda, 2012) to identify the main elements used by the social management scholars, clustering it in relevant dimensions toward the area.

In order to delineate the Brazilian social management field, we analyzed the scientific papers published in the Capes database. The criteria of the search were: (a) category of scientific paper;

(b) papers containing the expression 'social management' in the title; and (c) papers published between 1990 and April/2019. We chose this period because it rescues the historical progress of the scientific field. Furthermore, Capes database was chosen based on two reasons: (a) the social management approach is conducted by Brazilian researchers that publish in Portuguese and national journals; thus, Capes periodicals is a database providing papers meeting this criterion; and (b) the international literature offers few studies on social management, and the approach is different from Brazilian ones. Yet, the lexical analysis is not advised to be performed on a textual corpus with more than one language. Therefore, we focus on the results from Brazilian literature. The search carried out in June 2019 resulted in 73 papers on social management. We extracted the title, abstract, and keywords, and then conducted a content analysis based on quantitative techniques. The analyzes were operationalized by Interface de R pour Analyses Multidimensionnelles de Textes et de Questionnaires (IRAMUTEQ) software. IRAMUTEQ allows content analysis using statistics on the textual corpus and tables, individuals, or words (Camargo & Justo, 2013). We choose IRAMUTEQ because it is a free software based on the R software statistical environment and python language. In addition, IRAMUTEQ software provides techniques allowing overcome the quantitative and qualitative dichotomy in data analysis for quantifying and employing multivariate statistical calculations on primarily qualitative, textual variables. Therefore, it was the most suitable method for the analysis proposed in this study. We performed the following four analyzes:

(a) Lexical analysis: This step represents the identification and reformatting of text units, transforming them into initial context units (ICU) and elementary context units (ECU); identification of word frequency and reduction of words based on their roots (lemmatization process), creating dictionaries of their reduced forms (lemmas) for further clustering. Lemmatization converts verbs in their indicative tense, plurals are reduced to the singular form, and variants of the same lexical roots are reduced to the root to capture only the basic lexicons for further statistical analysis (Sarrica, Mingo, Mazzara, & Leone, 2016).

(b) Descending hierarchical analysis (DHA): This technique was initially proposed by Reinert (1983) and allows the classification of text segments according to their term, clustering them based on the frequency of lemmatized words. DHA considers the similarity and difference between word classes, and the degree of importance. The technique generates clusterization and hierarchy at the same time. It aims to maximize the similarity between statements within the same class and maximize the difference between classes. This measure can be indicated by chi-square ( $X^2$ ), since it is comparing an observed distribution with a uniform distribution. Chi-square is a measure of the relationship between words. In resume, it measures the co-occurrences of words within a class and the maximum difference between classes. The higher the  $X^2$ , the more particular is the term for a word class. The result is a classes partition, which is as homogeneous as feasible and as different as possible from each other.

(c) Correspondence factor analysis (post-factorial analysis): This step is performed from the DHA. The correspondence factorial analysis plots the words and variables associated with each DHA clusters them in a Cartesian plane, and indicates words statistically significant based on the p-value. Such words are plotted from the frequency or  $X^2$ . By the total inertia decomposition

method, the most representative point cloud is identified. Thus, it shows the lines that best fit and pass through the centroid 'c,' generating the primary vector of the asymmetric matrix (Carvalho & Struchiner, 1992).

(d) Similarity analysis: This analysis is based on graph theory and identifies the co-occurrences between words, indicating the connection between them with the degree of hierarchical importance. Graph theory allows us to identify a sociogram that is a graph in which the vertices correspond to the individuals of a group and the edges are the relations between these individuals (Pereira, 2001).

## ANALYSIS AND DISCUSSION OF RESULTS

The results of the lexical analysis, DHA, correspondence factor analysis, and similarity analysis of the 73 papers on social management analyzed are described in the next subsections.

### Lexical analysis

The lexicographic analysis is based on proximity, frequency, and percentage of relation strength between the words in the textual corpus. The lexical examination from 73 abstracts generated 368 text segments (TS). The total number of occurrences was 12,998, divided in 2,412 corpora. The Hápax index was 1,280, that means, 53.05% of the corpus contains a word (lemmas) used only once in a text. However, compared to the total number of occurrences, the Hápax represents 9.86%, that is, 238 words (lemmas) are not repeated in all the analyzed texts.

### Descending hierarchical analysis (DHA)

The data model loaded into IRAMUTEQ achieved good results and guaranteed the reliability of the descending hierarchical classification, indicating the utilization of 83.97% of TS classified in the corpus. This index is considered acceptable (>70%), indicating that statistical analysis of textual data is feasible (Camargo & Justo, 2013). Table 1 shows the summary of the analysis. The number of textual forms with frequency at least three occurrences in the total of texts was 536, therefore 22.22%, and the DHA resulted in three classes and six clusters.

Table 1

**Characteristics of the textual corpus**

No. of occurrences	No. of forms	Average of forms by text segment	No. of forms with frequency $\geq 3$	Lemmas	No. of text segments (TS)	No. of classified segments	No. of classes	No. of clusters
12,998	2,412	35.3	536	1,987	368	309 (83.97%)	4	6

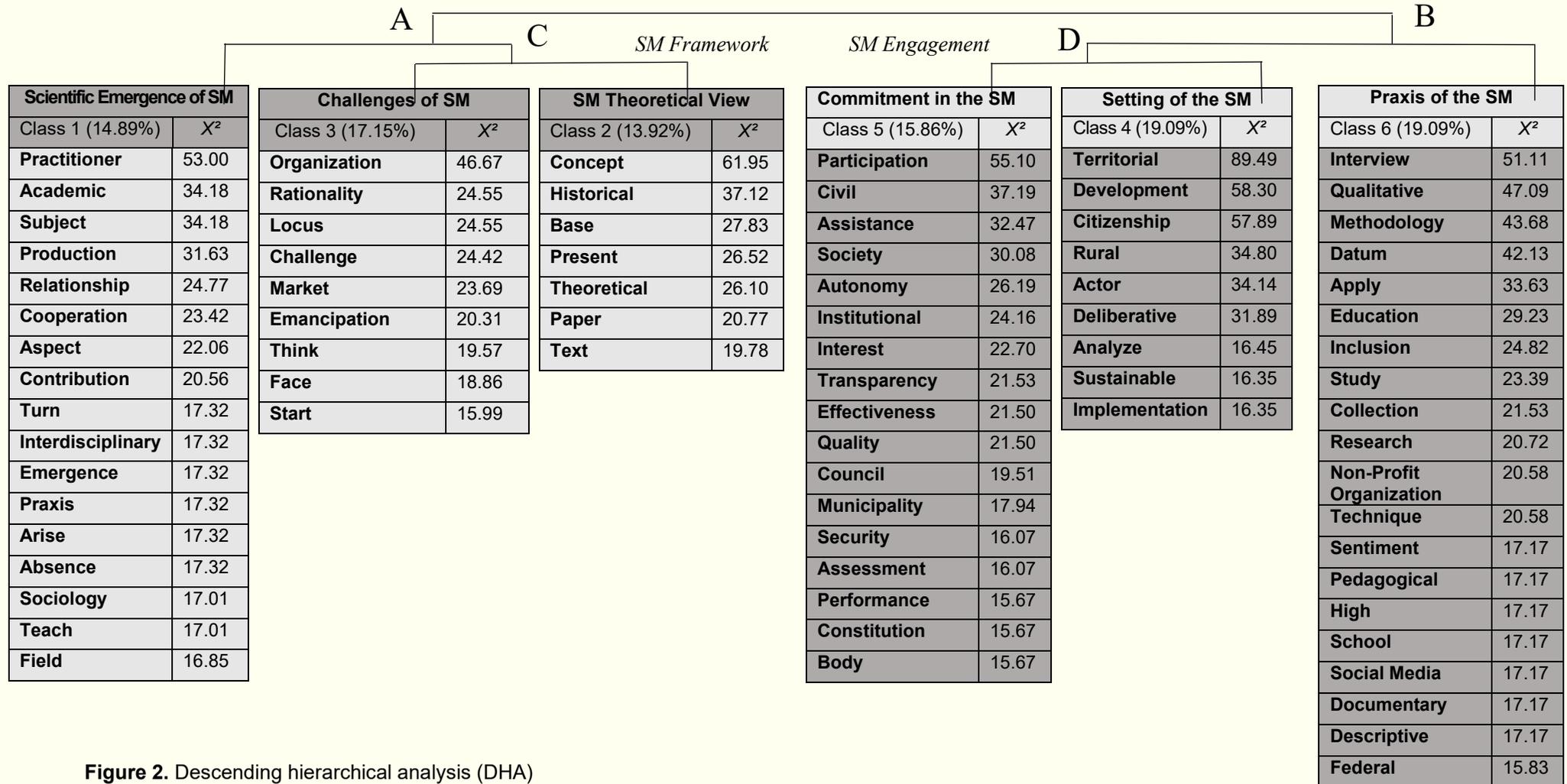
**Note.** Source: Prepared by the authors from the results of the IRAMUTEQ software.

Our findings show that the combination of text segments formed six clusters statistically and significantly associated with each other. In summary, the textual domains resulted in two independent clusters (A and B), two dependents (subclusters C and D), and six word classes. Class 1 covers 14.9% (46 of 309 TS), class 2 embraces 13.9% (43 TS), class 3 covers 17.1% (53 TS), class 4 includes 19.1% (59 TS), class 5 embraces 15.9% (49 TS), and finally, class 6 covers 19.1% (59 TS). Figure 2 provides an overview of the DHA results, i.e., the classes, structure, and relations, as well as the delimitation and hierarchical relationship among classes, clusters, and its elements. We retained the most important words based on the  $p$ -value  $< 0.0001$  and the highest chi-squares in each class.

The cluster A was labeled as ‘Social Management as New Frontiers,’ directly comprising class 1 labeled as ‘Scientific Emergence in Social Management.’ Cluster A includes a subcluster C labeled as ‘Framework of SM’ including the class 3 named ‘Challenges in the Social Management’ and class 2 named ‘Theoretical View of Social Management.’ The second cluster B was labeled as ‘Experiences of Social Management’ and it covers the class 6 named ‘Praxis in Social Management.’ Yet, it has a subcluster D labeled as ‘Engagement in Social Management’ and includes class 5 (‘Commitment of Social Management’) and class 4 (‘Settings of Social Management’)

*Social management as new frontier*

*Experiences of social management*



**Figure 2.** Descending hierarchical analysis (DHA)

Cluster A and its subcluster C have the lowest number of lemmas with  $p$ -value  $< 0.0001$ ; however, between the two clusters there is an equilibrium regarding the number of total lemmas (A with 45.9% and B with 54.1%). This finding indicated a balance among empirical and theoretical studies and showed that the field is growing based on praxis and theory as well.

The cluster A is formed by classes 1, 2, and 3. In this cluster, the words indicated textual structures related to the theoretical and conceptual notions of social management that the authors have sought to delimit over the years. It corroborates the statements of several authors who discuss the concept of SM making a point and a counterpoint with the characteristics that delineate it (Pinho & Santos, 2015b). That is a result according to the reality of scientific publications in the area since most articles are theoretical-conceptual discussions. In class 3, there is a high concentration of words that constitutes the denseness of the cluster A and represents 17.15% of the strength of the lemmas. The word 'organization' is on the top list and highlights the challenges of social management regarding market, emancipation, and the rationality of organizations. Scholars discuss these elements because they put the field at risk when considering it as a management model (Dowbor, 1999a); however, it is a complement to international studies of social management philosophy and social corporate responsibility (McManus, 2008; Porter & Kramer, 2011; Vitolla et al., 2017).

Cluster A also includes clusters 1 and 2. Both clusters refer to the scientific field of SM. On the one hand, class 2 lemmas represent 13.92% of the total texts analyzed, but the cluster presented only seven lemmas ( $p$ -value  $< 0.0001$ ). The lemmas indicate the search for making the production of this area of knowledge scientific. In addition, the lemmas are related to delimit a central concept for the field; as defended by Pinho (2010), the SM needs to improve its concept. On the other hand, class 1 (14.89% of lemmas) is associated with the emergence of the studies in this subarea of administration and represents the class with more significant lemmas ( $p$ -value  $< 0.0001$ ) in cluster A. In this cluster, social management practitioners appear as a driver to the development of the field, thus, it is in accordance with international studies on social activism (Terziev, 2018), social programs (Klassen & Vereecke, 2012; Terziev, 2018), and social leadership (Crowe, 2013; Porteous, 2013).

Cluster B shows concerns about the practice of social management and it includes the subcluster D and class 6. Class 6 has 19.09% of representativeness and the greatest number of words ( $p$ -value  $< 0.0001$ ). The main lemmas indicate textual structure related to empirical studies based on interviews, qualitative research, methods, applications, inclusion, non-profit organizations, among others. It relates to research in social management, highlighting the case studies and analyses that have led the field to a growing understanding of the practical applicability of the concept. This result is lined up with the so-called social management praxis, highlighting the relationships with social organizations, sustainability, and the third sector, corroborating Pacheco, Silva, Moretto-Neto, and Michels' (2012) work. Also, it is lined up with assumptions regarding the community governance (Bowles & Gintis, 2002; Reddel, 2004).

Next, the subcluster D includes the classes 5 and 4. Class 5 maintains a relation to the practice of SM but focuses on the commitment, participation, representativeness, effectiveness, and performance. These findings indicate a cluster focused on the social management results and in

the quality of participation based on transparency, as well as the presence of civil society. Therefore, it is in tune with the principal elements of Habermas's theories from 1984. Additionally, class 4 concentrates the territories of management, citizenship territories, deliberate actions, sustainable process for development, and construction and experiences around social management. It follows the approach of authors such as Dowbor (1999b), seeing SM in a new governance perspective, indicating that social management began to move out of the organizational field and became associated with sustainability and civil society issues. These ideas coincide with the main theories of governance (Maynz, 2000) and the modernizing government of Reddel (2004). The formation of these clusters is corroborated by the growing concern in the creation of SM and level assessment tools, as well as the quality of popular participation in public administration. For example, Oliveira, Cançado, and Pereira (2010), Guerra and Theodósio (2012), and Fischer (2012) address the context of social management in different research locations.

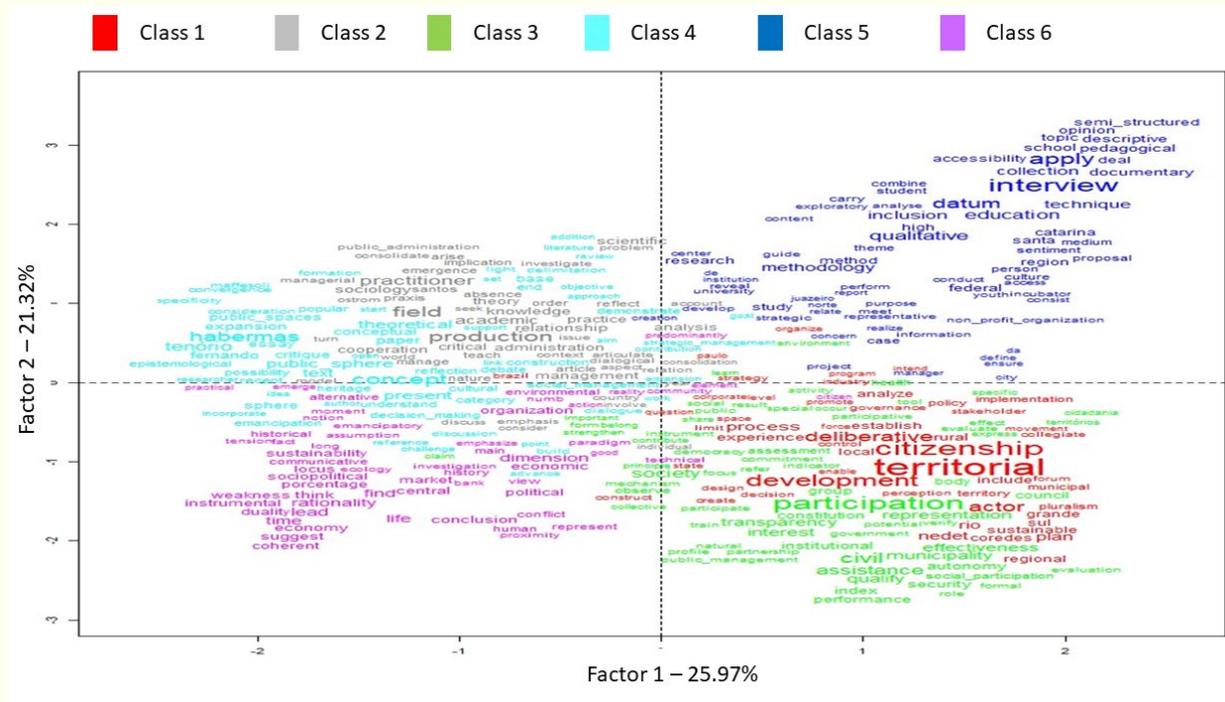
Comparing with the previous studies, our results showed clusters that mix elements from the four thought schools of social management. However, cluster A is closer to the stream derived from the Frankfurtian critique theory. The elements point out a focus on the theoretical-critical assumptions in which new management models are being built. In turn, cluster B and subcluster D are closer to the other three thought schools of SM. Class 5 has a relationship with the assumptions of the most transparent, participatory, and efficient public administration toward society's issues, that is, public societal approach. Likewise, there is a relationship between class 4 and the interorganizational social development school based on interorganizational networks that can be observed by the focus on the development of areas and citizenship. Finally, class 6 links to the assumptions of the Puquians related to the third sector and social movements, due to the elements focusing on actions and projects to solve social problems from non-profit organizations.

However, in comparison with international studies, only three new elements appear in the results. In class 6 (Praxis of the Social Management), the descending hierarchical analysis (DHA) shows the lemmas 'education' and 'pedagogical,' and class 4 shows the word 'citizenship.' These lemmas indicated an educational characteristic of the social management in the Brazilian perspective toward the pedagogical social action capable of boosting the social changes, creating a new mindset in the society. That means that social management can develop cognitive citizenship, and citizens' awareness about the rights and means to participate actively in the city government.

## Correspondence factor analysis

We performed a correspondence factor analysis (CFA) as a complementary analysis to verify the categories related to social management. In this context, the p-value calculated by IRAMUTEQ identifies the level of significance of the word in the class. In this study, the significance level of 0.05 was adopted. Thus, lemmas with  $p \leq 0.05$  are considered significant in the class stipulated by the software and were plotted from its frequency and chi-square ( $\chi^2$ ). Therefore, it indicated the adherence to the category showing the dependence relationship between variables. According to this technique, the lines and columns are composed of the same variables and arranged in a

Cartesian chart. Figure 3 shows the quadrants differentiating the categories by color to facilitate the view.



**Figure 3.** Correspondence factor analysis (CFA) based on  $\chi^2$

The correspondence between lemmas was analyzed based on its plotted on both axes X and Y. Factor 1 (axis X) presented a correspondence index of 25.97% of the lexical body and factor 2 (axis Y) a correspondence index of 21.32%. These findings demonstrate that the studies present a high dispersion of elements in the social management analysis and a low level of correspondence between them. The CFA also allows observing the participation of each dimension in the total explained variance of the lexical set through the Eigenvalue (Table 2).

Dimension 1 (Table 2) explains 25.97% with Eigenvalue of 0.35172, being the densest set, and the presence of words from classes 3 and 2, therefore, is associated with the production of theoretical knowledge and the challenges to implementing the social management. Dimension 2 also has an excellent explanatory power of the data set. The Eigenvalue was 0.28879 and explained 21.32% of the set, which is practically formed by classes 5 and 4, which relates to the participation and commitment to apply social management on the territories. When we add to these dimensions the explanatory capacity of dimension 3, we observe that all three account for approximately 67% of the data set. In dimension 3, predominates class 1, but it includes some lemmas of class 2, so this dimension refers to the emergence of a new frontier in the administration area, despite the low consensus among scholars.

In turn, dimensions 4 and 5 have a little explanatory power. The Eigenvalue is 0.23921 and 0.21537, explaining 17.66% and 15.90% of the lemmas set, respectively. They are formed by a mix of classes 1 and 5. It indicates the effectiveness of representation and participation through councils, social commitment, and public spaces, but shows relations with the emergence of scientific research on the field.

Table 2

**Correspondence factor analysis — Eigenvalues of the 5 dimensions**

Dimensions	Eigenvalue	%	% accumulated
1	0.35172	25.97	25.97
2	0.28879	21.32	47.29
3	0.25919	19.13	66.43
4	0.23921	17.66	84.09
5	0.21537	15.90	100.0

**Note.** Source: Prepared by the authors from the results of the IRAMUTEQ software.

The CFA results indicated the central lines and the centroid point (c), thus showing the most representative words of the textual set of the 73 scientific abstracts on social management. Therefore, associated with social management, stand out the lemmas: concept, strategy, Brazil, model, extension, industry, creation, question, instrument, society, community, mechanism, collective, relation.

The centroid of the set of the textual corpus indicated by the CFA is to understand the variables of social action management. Unlike the previous analysis, the CFA showed a focus on the strategic management and industry as part of the social management as ways to create a better society. This finding can be pointed out as the emergence of a new thought school in the social management field. This result is compatible with a scientific field under construction. It represents a manner to fill the research gap indicated by the criticisms related to the difficulty of transforming the theoretical assumptions of Habermas (1984), whose criticisms are defended by Tenório (2005) and other Brazilian scholars. Indeed, the main challenge of social management is to become a model of management in the territories. The similarity between these terms and their degree of significance substantiate research in social management. Therefore, it validates the theoretical contributions of Cançado, Tenório, and Pereira (2011), Botrel, Araújo, and Pereira (2011), Tenório (1998), and others.

**Similarity tree of social management categories**

The similarity tree synthesizes the highlighted classes, which enables both the identification of co-occurrences and the connection analysis between words of the textual corpus and their structure (Marchand & Ratinaud, 2012). This analysis pointed to the word ‘social management’ as a central theme and indicated its articulation with other topics. The similarity analysis showed a dense central nucleus, although with few strong branches (Figure 4). This configuration confirmed the dispersion of elements in the SM research and the low association between them

but revealed proximity among the researchers' point of view. Thus, we suggest that, in the future, the degree of consensus tends to increase, as well as the analysis categories may reach maturity stages in the field. The most vigorous branches come from the lemma 'social management' and establish solid relationships with management, social, development, practice, and theoretical perspective.

On the other hand, the branches beyond the central nucleus indicate trends that are broadening the scope of the scientific field. The 'management' branch of the similarity tree shows the relationship with strategy, the management of the municipality, and the institutions. This branch follows the thought school of societal public administration, while the 'social' branch is linked to the actors, the cities, the economic environment, and the opening of a frontier related to health. Thus, this tendency is aligned with the Puquian approach, that is, third sector and social movements (Dowbor, 1999a; Pacheco et al., 2012).

Another branch that extends beyond the center of the tree is related to local development, and is associated with the governance exercised by collegiate, branching out to the rural and institutional environment. This branch is influenced by the thought school of interorganizational social development conducted by Tania Fischer.

Citizenship is another aspect that comes from the Tenorian perspective. It emerges in establishing associations with the case analysis based on deliberative citizenship. Although the topic can be found across all schools of thought in social management, it is a typical heritage from the Frankfurtian critical approach (Cançado et al., 2015b), which focus on collective decision-making, dialogism, participation, transparency, and emancipation.

Another finding by the similarity analysis was verified by the qualitative character of research in SM, whose data collection techniques prioritize interviews. In addition, we observed new branches, such as the policies and their association with education and inclusion. The issue of participation by representativeness, with frequent use of collegiate, is also pointed out as a tendency. It is a mix of the interorganizational social development approach and the Puquian approach.

Summarizing, the findings of the similarity analysis indicate the existence of a large nucleus with a similar slope and ten new branches that are moving differently, but with complementary paths of study for social management. The secondary branches are aligned with the assumptions of the literature; however, neither of them indicates an evolution of social management from a broad theoretical construct to a systemic model of management. They showed local and sectorial applications of partial ideas of social management.



concepts of other approaches, which conduct the scholars to question about the novelty character of social management approach.

In general, similarity analysis confirms the theoretical assumptions of SM by associating it with model, instrument, challenge, result, and process at the same time. Moreover, it proves that it is a field of the profusion of approaches, despite the increase in the level of agreement among the scholar about the characteristics of social management, as indicated the density of the branches. In addition, new branches are few in the similarity three; therefore, the expansion of the field is limited.

## CONCLUSIONS

Our research objective was to determine the elements and categories of the Brazilian approach to social management by hierarchical classification from the analysis of scientific publications. At the same time, the analysis verifies the degree of newness in that approach in comparison with international publications. The analysis adopted quantitative techniques to analyze qualitative data. The results show that the textual structure of the social management area from a Brazilian perspective indicates theoretical and practical categories to substantiate the social management field.

The findings of this research can be summarized in three groups of conclusions that respond the initial questions: What elements and categories are prioritized in social management studies by Brazilian scholars, and what elements the Brazilian approach of SM offers.

The first group of results was obtained through the lexical analysis and the descending hierarchical analysis (DHA). These techniques generated categories to social management expressed through hierarchically classified clusters, subclusters, and classes. The data analysis points out that the evolution of the field in theoretical and practical terms goes side to side as two independent groups. One group focuses on the theoretical and conceptual notions whose primary basis is the participation of society. Another group focuses on understanding the empirical application, based on case studies of social management and public policies that have generated applications in citizenship territories.

Based on the  $\chi^2$  scores, we inferred that the categories of studies on participation, citizenship, social commitment, and representation in the public sphere hierarchically precede the very conceptual and theoretical notion of social management. These results can be an indication that social management moves toward a more practical perspective and follows the way of international studies on social actions and social activism. Regarding the class related to SM praxis, we conclude that the engagement and settings are necessary conditions to the practical advances in SM.

The categories of social management were hierarchized according to the representational capacity (number of lemmas). The result indicated the order: (1) SM Praxis; (2) SM Settings; (3) SM Challenges; (4) SM Commitment; (5) SM Scientific Emergence; (6) SM Theoretical View. In each

cluster, the study indicated a hierarchy of elements to analyze social management based on the greater  $\chi^2$ ; for instance, we highlight territorial, concept, development, citizenship, participation, practitioner, interview, and organization. Other highlighted elements are shown in Figure 2.

These findings confirmed the origins of SM in social participation studies and that this is the primary basis of this management proposal. Therefore, the Frankfurtian critical approach started by Cançado et al. (2015b), yet is the core of all social management studies. Basically, they defined social management as a process of collective decision-making without coercion.

The findings confirmed that Boaventura Sousa Santos' ideas on democratizing democracy influenced and permeated the four thought schools of social management in different degree (Peres & Pereira, 2014). Although all thought schools of SM offer contributions to the field, our results reinforced the new reformist paradigm pointed out by societal public administration approach for transforming the state in a type of social movement (Paula, 2005). In addition, the three pillars of social regulation in Western modernity, which are part of the Boaventura's ideas, society, state, and market (Wanderley & Raichellis, 2001), were not highlighted by our results equally. Among these elements, the discussion around the market context is still scarce. Specifically, the word 'market' appears in the category of challenges, as well as organizations, but we did not identify other terms related to market contexts. Maybe, it is one of the weak points in making social management a systemic and applied model, since the engagement of firms is essential for providing economic support to move social actions. The link between social corporate responsibility and social management is not explored by the Brazilian studies. However, it is an essential link in international studies. Brazilian and international perspectives represent different concepts, but both are complementary actions. For instance, in the social management philosophy (McManus, 2008; Porter & Kramer, 2011) it resulted in social management standards such as SA8000. Our findings indicated that the social management Brazilian scholars defend the triad society, state, and market, but focus much more on state and society, while international studies recognized the role of firms in the management of the social.

The second group of results points to the findings related to the centrality of the field extracted from the correspondence factor analysis based on the  $\chi^2$  and p-value. Central categories of social management are concept, strategy, Brazil, model, extension, industry, creation, question, instrument, society, community, mechanism, collective, relation. These results corroborated the studies by Cançado, Villela, and Sausen (2016), which highlight the importance of understanding reality and the challenge of performing SM. These results are compatible with a scientific field under construction that is criticized about its abstraction and the difficulty of transforming its theoretical assumptions into a management model. The centrality of elements in the correspondence factor analysis indicated that the scholars are working to reduce this gap between academic view and the practice of social management. The main finding extracted from the CFA was the detection of the lemmas strategy, industry, and model, as centroids associated to mechanisms of creation of value to the society, because this result indicated the emergence of a fifth thought school not identified by previous studies.

Finally, the third group of findings comes from the similitude analysis. Despite social management being a paradigm in progress, and currently undergoing criticism, there is a degree

of agreement about its study categories, with a high degree of connectivity and concentration among the lemmas. Thus, although SM is a diffuse concept, sometimes considered as a process, instrument, or tool, and sometimes it is treated as a result or model, the findings showed similarity and concentration in the categories, with little existence of ramification of categories away from the central concept. Nevertheless, the ramifications beyond the core indicate few new frontiers of social management, some of them not included in previously classification performed by other scholars – for instance, branches related to education and health. Since the studies that delimit schools of thought, categories, principles, and dimensions of the social management, the field is experiencing a slow expansion. However, it is still endogenous and little internationalized. Our results show that the empirical applications of the concept are moving the area toward generation of more realistic models of SM. The Brazilian perspective of SM is a mix of many approaches to promote a broader model of management of the social questions, but the differentiation is in the cognitive citizenship, an educational and pedagogical process.

Our set of findings is aligned with the previous literature that, despite being a field that emerged in the 90s, has been the object of study by many researchers, making social management an interdisciplinary field of scientific knowledge. This characteristic has led to theoretical advances in SM, as well as contributions from areas such as governance (Dowbor, 1999a) and territorial development management (Fischer, 2012). However, it can hamper the consolidation of the field as a discipline with its own theoretical background. Currently, the social management tends to be a subfield of management science in which the knowledge is used to solve social problems. Forthcoming, the consolidation of the discipline can present models or tools to management, as well as the mechanism to verify the results. SM may be following the same path that public management crossed to created public administration as discipline and field.

This study is not free of limitations. The major limitation is that some abstracts do not clearly present the analysis categories in the text. However, this problem was minimized by the use of the paper's keywords, and by the content analysis itself, which extracts a considerable number of words from the lemmatization process. Likewise, we minimize limitations by concentrating on items with higher chi-square and p-value indices.

Our research offers theoretical and practical contributions. Theoretical contributions are to point out the existence of a concentrated view among the researchers regarding the SM categories and provide an overview of the field progress. On the other hand, the empirical contribution is to offer a hierarchy of elements that may be useful for building models for measuring the efficiency and effectiveness of SM in praxis.

Based on the gaps in the literature, some opportunities for future SM research can be considered. We suggest to conduct studies on the perception of social management categories in the international literature, as well as to analyze the SM categories from the discourse of the actors who practice it. Finally, we suggest to scholars of SM more balance among the three pillars of social regulation in Western modernity: society, state, and market, since there is interdependence between economy, environment, and society. Therefore, the social management needs more

communication with the science of administration, especially focused on corporate social responsibility and other themes of sustainable modern firms.

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