LIMITATIONS OF TRADITIONAL MANAGEMENT IN SOCIAL PROJECTS: A SCOPE ANALYSIS IN A HIGHLY SUBJECTIVE CONTEXT

LIMITES DA GESTÃO TRADICIONAL EM PROJETOS SOCIAIS: UMA ANÁLISE DE ESCOPO EM CONTEXTO COM ALTA SUBJETIVIDADE

LÍMITES DE LA GESTIÓN TRADICIONAL EN PROYECTOS SOCIALES: UN ANÁLISIS DE ALCANCE EN UN CONTEXTO DE ALTA SUBJETIVIDAD

ABSTRACT

Objective: To analyze how difficulties in scope detailing within a social project can compromise its success, especially when traditional project management methodologies are applied in highly subjective contexts.

Context: The study is based on a volunteer project developed by a non-profit organization specializing in project management. The initiative, carried out in a nursing home, aimed to promote food security, health, and quality of life. The research examined 16 meeting minutes, 8 progress reports, other operational records, and included a structured interview with the project sponsor.

Diagnosis: Document and observational analysis revealed that the rigid formalization of the scope, focused on tangible deliverables (donations), combined with the absence of qualitative tools, compromised the identification of subjective needs and intangible expectations of the beneficiaries, such as social interaction and leisure. This resulted in the partial failure of the project, with misaligned outcomes, exposing the limitations of traditional practices in social contexts.

Limitations: As a single case study, results are not generalizable. The absence of structured interviews with the final beneficiaries (residents) limits the depth of the analysis of expectations, despite the inclusion of the managerial perspective obtained from a structured interview with the project sponsor.

Practical implications: It is recommended to adopt hybrid management models that combine discipline with flexibility, using participatory techniques and qualitative indicators to align project deliverables with beneficiaries' expectations.

Social implications: Aligning project scope with beneficiaries' values supports more legitimate, sustainable, and socially impactful interventions.

Originality / Value: The study provides empirical evidence of the shortcomings of traditional practices in a social project and proposes practical guidelines for scope management in projects involving intangible deliverables and subjective expectations, broadening the discussion on the limitations of conventional models in complex social environments.

Keywords: Project Management, Social Projects, Scope Management, Stakeholders, Intangible Deliverables.

Jose Guilherme da Cunha Castro Filho
PhD Student
Universidade Nove de Julho – Brazil
guilhermefilho@uni9.edu.br

Cristina Dai Prá Martens
PhD
Universidade Nove de Julho – Brazil
cristinadpmartens@gmail.com

RESUMO

Objetivo: Analisar como as dificuldades no detalhamento de escopo em um projeto social podem comprometer seu sucesso, especialmente quando se aplicam metodologias tradicionais em contextos de alta subjetividade.

Contexto: O estudo baseia-se em um projeto voluntário desenvolvido por uma organização sem fins lucrativos especializada em gestão de projetos. A iniciativa, realizada em um lar de idosos, visava promover segurança alimentar, saúde e qualidade de vida. A pesquisa examinou 16 atas de reunião, 8 relatórios de progresso, outros registros operacionais e incluiu uma entrevista estruturada com o sponsor do projeto.

Diagnóstico: A análise documental e observacional revelou que a formalização rígida do escopo, focado em entregas tangíveis (doações), e a ausência de instrumentos qualitativos comprometeram a identificação de necessidades subjetivas e expectativas intangíveis dos beneficiários, como interação social e lazer. Isso resultou no insucesso parcial do projeto, que teve entregas desalinhadas às necessidades, evidenciando a limitação das práticas tradicionais em contextos sociais.

Limitações: Como estudo de caso único, os resultados não são generalizáveis. A ausência de entrevistas estruturadas com os beneficiários finais (residentes) restringe a profundidade da análise das expectativas, apesar da inclusão da perspectiva gerencial obtida a partir de uma entrevista estruturada com o sponsor do projeto.

Implicações práticas: Recomenda-se a adoção de modelos de gestão híbridos que combinem disciplina com flexibilidade, utilizando técnicas participativas e indicadores qualitativos para alinhar as entregas às expectativas dos beneficiários.

Implicações sociais: O alinhamento entre escopo e valores dos beneficiários favorece intervenções mais legítimas, sustentáveis e com maior impacto social.

Originalidade / valor: O estudo oferece evidências empíricas da falha de práticas tradicionais em um projeto social, propondo diretrizes práticas para gestão de escopo em projetos com entregas intangíveis e expectativas subjetivas, ampliando o debate sobre os limites dos modelos tradicionais em ambientes sociais complexos.

Palavras-chave: Gestão de Projetos, Projetos Sociais, Gestão de Escopo, Partes Interessadas, Entregas Intangíveis.

RESUMEN

Objetivo: Analizar cómo las dificultades en la definición del alcance en un proyecto social pueden comprometer su éxito, especialmente cuando se aplican metodologías tradicionales en contextos de alta subjetividad.

Contexto: El estudio se basa en un proyecto voluntario desarrollado por una organización sin fines de lucro especializada en gestión de proyectos. La iniciativa, realizada en un asilo de ancianos, tuvo como objetivo promover la seguridad alimentaria, la salud y la calidad de vida. La investigación examinó 16 actas de reuniones, 8 informes de progreso y otros registros operativos.

Diagnóstico: El análisis documental y observacional reveló que la formalización rígida del alcance, centrada en entregas tangibles (donaciones), junto con la ausencia de herramientas cualitativas, comprometió la identificación de necesidades subjetivas y expectativas intangibles de los beneficiarios, como la interacción social y el ocio. Esto resultó en un fracaso parcial del proyecto, con entregas desalineadas a las necesidades reales, evidenciando las limitaciones de las prácticas tradicionales en contextos sociales.

Limitaciones: Al tratarse de un estudio de caso único, los resultados no son generalizables. La ausencia de entrevistas estructuradas con los beneficiarios limitó la profundidad del análisis.

Implicaciones prácticas: Se recomienda adoptar modelos de gestión híbridos que combinen disciplina con flexibilidad, utilizando técnicas participativas e indicadores cualitativos para alinear las entregas con las expectativas de los beneficiarios.

Implicaciones sociales: El alineamiento entre el alcance del proyecto y los valores de los beneficiarios favorece intervenciones más legítimas, sostenibles y con mayor impacto social.

Originalidad / Valor: El estudio aporta evidencia empírica sobre las fallas de las prácticas tradicionales en un proyecto social, proponiendo directrices prácticas para la gestión del alcance en proyectos con entregas intangibles y expectativas subjetivas, ampliando el debate sobre los límites de los modelos tradicionales en entornos sociales complejos.

Palabras clave: Gestión de Proyectos, Proyectos Sociales, Gestión del Alcance, Partes Interesadas, Entregables Intangibles.

INTRODUCTION

Socio-environmental projects have a complex and dynamic nature, marked by multiple actors and intangible deliverables. Their main differentiator lies in the ability to generate positive and sustainable social impacts, promoting benefits for specific communities (Di Maddaloni et al., 2025). However, managing these projects remains challenging, especially when applied by organizations that use traditional project management standards based on assumptions of predictability, control, and linearity (Ika, 2012). This incongruity between traditional methods and non-linear social contexts exposes relevant gaps in the theory-practice integration. The view of project management as a universally applicable discipline, grounded in a set of methods, tools, and techniques for planning and control, defines the traditional model as an idealized, persuasive, and command-oriented model, which fails to address the complex processes of human relations that occur in unpredictable project environments and ignores social and political aspects within the project context (Cicmil & Gaggiotti, 2018).

Baba, Mohammad & Young, (2021) support the recommendation to delve deeper into the gaps in social projects, justifying that the deficiencies identified in project management stem directly from the instrumental and short-term mindset of traditional project standards, which prioritize efficiency in time, cost, and tangible deliverables. This traditional approach, often centered on the project's viewpoint, fails to provide adequate guidance for promoting socio-environmental impact in local communities, treating stakeholder engagement as a strategic means to manage risks or obtain approval, resulting in superficial and instrumental engagement (Babaei, Locatelli & Sainati, 2023). The relevance of this gap is explicitly justified by the fact that traditional project management neglects the social dimension and marginalizes secondary stakeholders, such as local communities, which, despite having little power over project resources, suffer the most severe social and environmental consequences of the projects (Baba et al., 2021).

On the other hand, when projects are able to meet the needs of those involved, strengthen relationships, and build trust throughout their life cycle, there is a greater probability of success (Bandé, Ika & Ouédraogo, 2024). In environments marked by the subjectivity of stakeholder expectations, such as social ones, scope definition and management become critical challenges that can lead to both project success and failure.

The lack of social participation and the neglect of local concerns in the initial project phases compromise trust, generate resistance, and hinder the consolidation of lasting benefits, reinforcing the idea that the social dimension is as strategic as the project's technical aspects. In public infrastructure projects, for example, Brunet et al. (2025) highlight that project success goes beyond the delivery of technical and financial results, with social acceptability being a crucial factor for their legitimacy and sustainability. Projects of this nature frequently fail for political reasons, conflicts of interest, and unstable objectives (Clegg & Biygautane, 2025). Even with technical results achieved, the absence of social acceptance compromises the legitimacy and sustainability of the initiatives (Brunet et al., 2025). Furthermore, individual competencies of those involved, such as active participation and cooperation, are directly linked to project performance (Park & Kim, 2024), just as expanding community participation positively impacts social outcomes (Vera-Burau, Sanmiquel Pera & Bascompta Massanes, 2025).

Thus, the objective of this technological article is to analyze how difficulties in detailing the scope in a voluntary social project can compromise its success, especially when traditional project management standards are applied in contexts of high subjectivity of deliverables. The analyzed case addresses a four-month voluntary project supported by a non-profit organization,

here referred to as the executing institution, recognized for its expertise in project management and its adoption of the best practices of the Project Management Institute (PMI, 2021). Despite having these technical competencies, the analyzed project faced significant failures in adapting traditional practices to the social context in which it was executed: a nursing home maintained by a religious association. The subjectivity of the social context, combined with inefficient communication and the absence of mechanisms to capture the real needs of the beneficiaries, compromised the alignment between the deliverables and the values expected by the stakeholders, thereby compromising the results of the volunteer project. The success of social projects depends on meeting the needs and expectations of the beneficiaries, which are often subjective in nature (Junges et al., 2020).

This scenario highlights a relevant opportunity: to adapt and improve scope management methods in social projects, based on a critical analysis of documented practices. The identified gap between normative frameworks and application in non-traditional contexts, as also discussed by Ika (2012) and Svejvig & Andersen (2015), reinforces the relevance of hybrid models that balance technical rigor with sensitivity to social specificities.

The proposal is based on a qualitative case study (Yin, 2018), which includes the document analysis of minutes, reports, and operational records of the project, aiming to reconstruct its trajectory, identify the main challenges faced, and suggest paths for methodological solutions more adherent to the social context.

Based on the concept of a technological article, this study emphasizes applied contribution, being use-oriented and focused on problem-solving, in order to seek to fill the gap between theory and practice, offering a relevant contribution to managers and researchers (Motta, 2022). This study contributes to more effective practices for social projects, expanding the dialogue between theory and practice in the field of project management by: (a) highlighting the limitations of traditional project management standards, such as those of the PMI (2021), in contexts with intangible deliverables and multiple stakeholders, corroborating and expanding criticisms already made in this direction (Ika, 2012; Svejvig & Andersen, 2015); (2) proposing the integration of participatory approaches and qualitative metrics to capture subjective expectations in social projects, filling the methodological gap pointed out by Ebrahim and Rangan (2014) ; and (3) Proposing practical applications for adjustments in scope management in social projects, based on empirical evidence of failures and successes documented in the analyzed case. These contributions respond to the need for models that are capable of combining the rigor of traditional project management standards with the complexity of social impact projects.

CONTEXT AND THE INVESTIGATED REALITY

The reality investigated in this study corresponds to a third-sector organization, referred to in this article as the executing institution. It is a Non-Governmental Organization (NGO), civil and non-profit, formed by citizens committed to promoting and disseminating good practices in project management. Its actions focus on social, environmental, educational, cultural, and humanitarian initiatives, with the objective of contributing to professional and institutional development through knowledge applied to project management.

The institution operates in the service sector, with a specific focus on education and professional development in the area of project management. It is affiliated with international entities based in the United States, whose project management and ethical standards it has fully adopted since its foundation. Its scope of action includes organizing training events, certification programs, volunteer actions, and integration activities among professionals in the field. The institution's target audience includes certified professionals, academics, teachers, consultants, and representatives of public and private organizations that work with project management.

Internally, the executing institution is characterized as a small organization, with about 15 direct employees and approximately 20 active volunteers. Its governance model includes an

executive board composed of a president, vice--president, and directors of areas such as marketing, certifications, and volunteering, in addition to fiscal and advisory councils, committees, and thematic groups. Its monthly revenue is variable and depends on the number of members, as well as the realization of events and partnerships.

In the external environment, the organization is positioned in a competitive scenario marked by educational institutions, professional associations, and training entities that also operate in the promotion of project management. However, the investigated institution differentiates itself through its emphasis on regional events, such as congresses, workshops, seminars, and study groups, as well as its production of technical content and the establishment of strategic alliances with educational and corporate institutions. All these actions are aligned with global standards of excellence in project management, conferring technical legitimacy and recognition in the field to the institution.

This organizational characterization provides the necessary elements to understand the environment in which the analyzed volunteer project was conceived and executed, and to contextualize the challenges faced in applying project management methodologies in a social context.

Diagnosis of the Problem-Situation and/or Opportunity

The "Nursing Home" volunteer project was conceived by the executing institution as a social impact initiative, with three main objectives: (i) to ensure food security for the residents, through the collection of non-perishable food; (ii) to improve health conditions, through the donation of basic medical equipment; and (iii) to promote improvements in the quality of life of the assisted elderly. To this end, a Work Breakdown Structure (WBS) was developed, subdividing the deliverables into groups of volunteers responsible for specific items such as food, bed linens, and medical supplies (Figure 1).

Figure 1

WBS of the project developed by the project team.
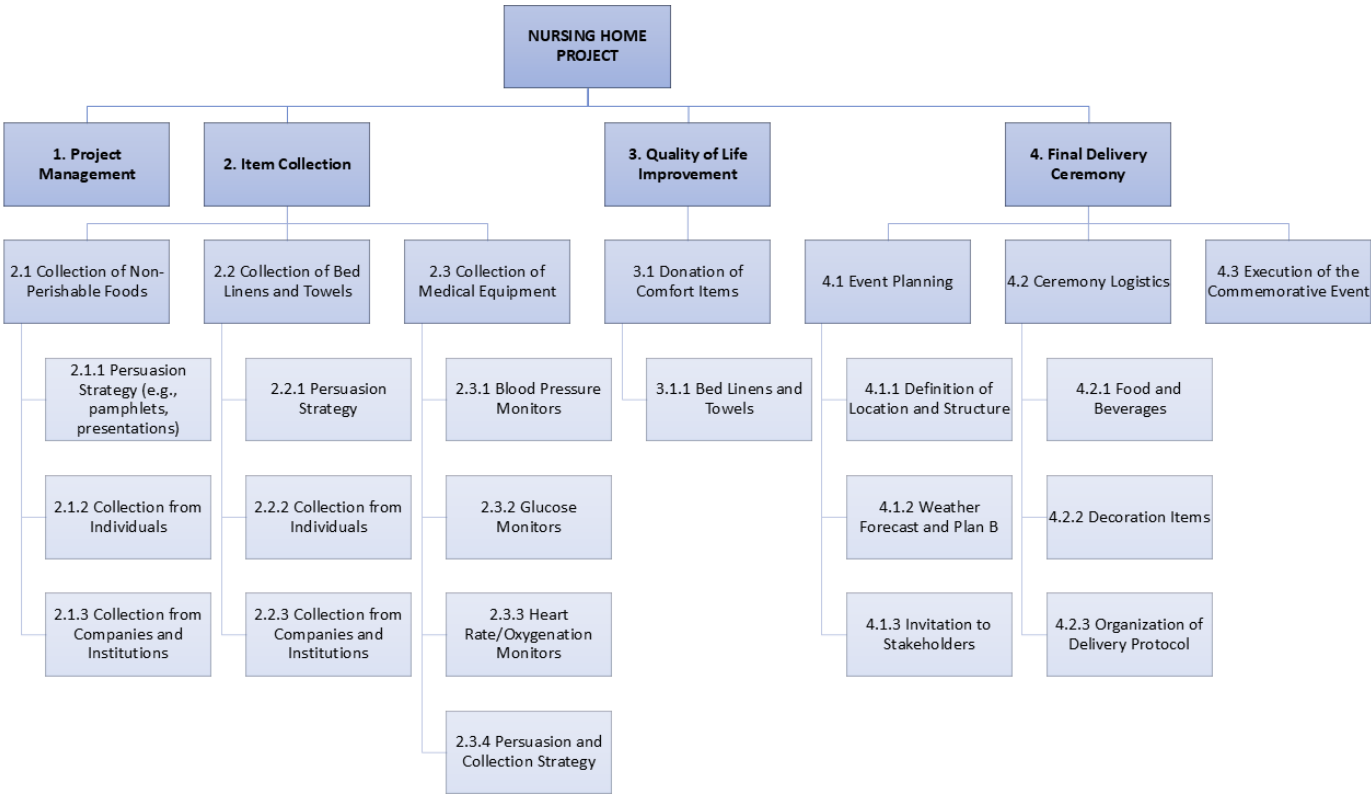
Source: Prepared by the authors (2025).

The project's execution was carried out by volunteers certified in project management, under the coordination of the executing institution's board. The project was structured to be implemented in four months, culminating in a festive ceremony on the beneficiary institution's anniversary, which would be organized by a specific group of volunteers. Framed within the social sphere, the project combined humanitarian assistance, aiming to improve the quality of life of the elderly, testing the various project management tools and best practices described in the PMBoK (PMI, 2021), with the intent of promoting social benefit and simultaneously training the volunteer members of the executing institution in the best practices of project management.

In the detailed scope of the project, as mapped by the volunteer members, the volunteer groups were to be divided into sets of items to be collected, such as non-perishable food, bed linen, and medical care supplies (blood pressure, glucose, heart rate, and oxygenation monitors).

The volunteer project had the following assumptions: The deliverables should be collected through the volunteers' ability to persuade individuals, other institutions, and companies. For this, each volunteer group responsible for each delivery group should create its own persuasion strategy, which could be, for example, a presentation, pamphlet, or expository meeting.

Some compliance restrictions had to be adopted, such as the impossibility of volunteers receiving direct money or the disclosure of bank accounts for deposits by donors. Any violation of the compliance rules would be a serious offense and would result in the volunteer's exclusion from the project. Another restriction was the fact that the project had no planned costs to be covered by the executing institution, with volunteers being fully responsible for developing strategies, persuasion materials, and necessary travel. The only cost foreseen by the executing institution would be for the food, beverages, and decoration items related to the project's delivery party.

Another important restriction that was agreed upon at the beginning of the project with the nursing home's maintainer was the impossibility of scope change after the project started. Thus, after the initial scope was agreed upon between the person in charge and the members of the executing institution's board, minutes were signed between the parties to formalize the scope. Finally, an important restriction was the impossibility of using the executing institution's brand in promoting the project and fundraising, meaning the company's brand could not be used for persuasion purposes, which would constitute a serious compliance failure if it occurred.

Additionally, the project had some mapped risks, including: (i) communication failures between the teams responsible for the deliverables, which could lead to duplicated contact with the same company for different requests; (ii) failure to meet the collection deadlines for certain items, which could compromise the final delivery and generate frustration among the main beneficiaries, especially the elderly; (iii) difficulties in organizing the closing ceremony, caused by unforeseen events such as adverse weather conditions due to part of the ceremony location being uncovered, as well as problems with food ordered from hired buffets ; and (iv) the possible withdrawal of volunteers, motivated by lack of time or engagement throughout the project.

It is important to note that the challenges associated with scope definition in social projects differ from those found in engineering and construction projects, for example, as such projects operate with well-established parameters, objectives, and metrics for time, cost, and quality, whereas social projects face additional complexities, such as the intangible nature of part or all of their deliverables and the multiplicity of stakeholders with often divergent interests (Ebrahim & Rangan, 2014). The management of large construction projects is notoriously difficult and is limited by the traditional norms of the project management profession, which are designed to avoid external interruptions to predetermined objecti-

ves and return on investment (Cicmil, Williams, Thomas, & Hodgson, 2006). Scope management in social impact projects must include substantive criteria, linked to social development and the appreciation of those involved, thereby reinforcing the need to meet the multiple and subjective views of value and success of everyone involved in the project (Coelho, 2004).

The problems related to scope clarity, as treated by traditional project management standards, prove insufficient to guarantee project success, because such standards focus excessively on the execution phase, based on the implicit premise that the project exists in a stable and known environment (Svejvig & Andersen, 2015). Given this, the emphasis on the initial stage of projects (project front end) is superficially explored, highlighting the lack of support and formalized processes to help project teams effectively define the benefits to be achieved. The problem in this initial stage is characterized by imprecise project goals and unclear or partially defined objectives. Furthermore, there is still little emphasis in the literature on long-term target benefits that aim to improve the organization's performance beyond the project's completion (Zwikael & Meredith, 2019).

Additionally, the approach to the characteristics of traditional projects and how teams define the project scope is portrayed by Eder et al. (2015) in a comparison with scope definition in the agile approach. In this approach, the scope is described in a comprehensive, challenging, ambiguous, and metaphorical way, contrasting with the exact, textual, and contractual-norm-based description of the traditional approach. Socio-environmental projects, although sharing characteristics of standard projects such as temporality and constraints of time, cost, and quality, differ from traditional projects mainly regarding their objectives and the way they are conducted over time. Socio-environmental projects are simultaneously technical, social, and political undertakings, having partial or total intangibility of their scope as a characteristic element (Ika, 2012). Such intrinsic characteristics of complexity and social and political nature contribute directly to the difficulty in defining a clear and rigid scope in the early project phases, in addition to the existence of a number of heterogeneous stakeholders with divergent perspectives, making it challenging to define a scope that addresses all concerns.

Studies like those by Ebrahim and Rangan (2014) highlight the need to rethink the concept of scope in social projects. Unlike traditional projects, focused on tangible deliverables, rigid metrics, and fixed contracts, social projects operate with high flexibility and qualitative metrics. Table 1 illustrates this distinction.

Table 1

Scope characteristics in traditional versus social projects

Criteria	Traditional Projects	Social Projects
Nature of deliverables	Tangible (e.g., construction)	Intangible (e.g., well-being)
Success metrics	"Schedule, cost, quality"	"Social impact, satisfaction"
Scope flexibility	Low (fixed contracts)	High (emerging demands)

Source: Adapted from Ebrahim & Rangan (2014).

Critical variables, such as the intangibility of results, the multiplicity of stakeholders with divergent interests, and operational restrictions (like the prohibition of fundraising), directly impacted the project. The divergent interests and expectations among the stakeholders involved in the project proved to be important factors to be observed in social impact projects. The involvement of stakeholders from the initial phases of the project is a critical element for organizational success, based on stakeholder theory (Friedman & Miles, 2006), which establishes the preferences of stakeholders' needs as premises that must be prioritized at the beginning of any action (Gitamo, 2018). Positive and highly significant correlations between effective stakeholder planning and project performance show that the absence of this planning can result in the stagnation or failure of the initiative (Moulid et. al, 2021).

Likewise, it is fundamental to maintain a regular flow of information that integrates the stakeholders' perspective into the project, as well as to adopt participatory monitoring that promotes transparency and allows their influence in defining success criteria (Pheng, 2017). However, understanding the priorities of the different stakeholder groups involved in the project is one of the main challenges in conducting a socio-environmental project with multiple stakeholders, as such priorities are not always clearly understood and captured, besides the fact that the project scope does not necessarily reflect the parties' concerns (Kang et al., 2016).

The management of social projects requires an understanding of the different perceptions of stakeholders about the project's value and the common objective in complex projects with multiple stakeholders (Abidin & Pasquire, 2007; Fernández-Sánchez & Rodríguez-López, 2010). The governance of social projects, which includes direct and indirect stakeholders, regulators, and partners, gains importance in this type of project in order to ensure that social project management practices are implemented and controlled more clearly (Kivilä et al., 2017).

The integration of different perspectives in planning and execution is important for project success, especially in projects with socio-environmental deliverables and impacts. The initial definition of costs and scope is challenging in projects that have limited information in the initial stage and can lead to economic and political complications if the estimates are not reliable (Luo et al., 2024). The involvement of stakeholders, including the local community, from the conception stages, is essential to ensure that the project reflects the needs and expectations of all involved, promoting a solid basis for decision-making and mitigating potential conflicts and increased project complexity (Nava et al., 2025). This complexity is aggravated when stakeholder priorities diverge, requiring an approach beyond the traditional triple constraint of time, cost, and quality (Diallo & Thuillier, 2004).

Such challenges eventually arise from limitations in aligning project objectives among stakeholders, resulting in dissatisfaction and resistance from those involved throughout the project's life cycle (Nava et al., 2025). The adoption of participatory and direct approaches in project monitoring reduces delays, conflicts, and ensures that decisions incorporate multiple perspectives, in addition to expanding the actors' commitment to the intended results, so that stakeholder management goes beyond mere recognition of their roles and configures itself as an important component of governance in projects with socioeconomic interfaces (Moulid et al., 2021).

In contexts where there is high interdependence between technical decisions and the social perceptions of stakeholders, it becomes a priority to understand who the stakeholders are and the themes that each group defines as priorities (van Offenbeek & Vos, 2015). The multiplicity of stakeholders, including from multilateral organizations to direct beneficiaries and the general population, defines a complex hierarchization of success dimensions, where adherence to institutional parameters coexists with the need to ensure legitimate and lasting social impacts. Such a scenario reinforces the importance of a contextualized and continuous understanding of stakeholders' motivations to ensure the sustainability and effectiveness of the implemented interventions (Diallo e Thuillier, 2004).

The execution of the project focused on in this study revealed structural weaknesses in scope management, planning, and stakeholder en-

gagement, evidencing a misalignment between traditional project management practices and the intrinsic challenges of complex social contexts. Such challenges include the intangibility of deliverables, the multiplicity of stakeholders with heterogeneous expectations, the operational restrictions imposed on the project, and project risks. This reality reinforces the specialized literature's criticism of the limitation of traditional scope models in social projects, which tend to assume stable environments and well-defined goals (Svejvig & Andersen, 2015; Zwikael & Meredith, 2019).

Understanding the social complexity of volunteer projects requires a multidisciplinary approach, integrating concepts from stakeholder theory (Friedman & Miles, 2006; Gitamo, 2018), participatory governance (Kivilä et al., 2017), and value management in multi-stakeholder contexts (Abidin & Pasquire, 2007; Fernández-Sánchez & Rodríguez-López, 2010). The literature emphasizes the importance of stakeholder involvement from the initial project phases, as an essential condition for identifying legitimate priorities and for aligning scope and intended impact (Kang et al., 2016; Nava et al., 2025).

The analysis of project documents revealed that the absence of formal mechanisms for capturing stakeholder expectations and the limitation of communication channels between teams hindered the alignment of objectives, contributing to the low adherence of the scope to the beneficiaries' needs. Furthermore, data triangulation, from the analysis of minutes, progress reports, tracking spreadsheets, and institutional documents, allowed for the verification of recurring failures in managing the interfaces between the involved groups.

These evidences confirm the need to develop hybrid management models that reconcile the rigor of management standards with contextual flexibility, as suggested by Ika (2012), Cicmil et al. (2006), and Luo et al. (2024) . The adoption of participatory approaches, capable of integrating different views and building legitimacy throughout the project life cycle, proves particularly relevant for projects with a social scope, in which priorities, expectations, and success criteria vary among stakeholders.

Finally, it is emphasized that, as this is a social project with multiple interfaces (technical, social, political, and operational), the diagnosis of the problem-situation highlights the need to redefine the mechanisms for scope definition, collaborative planning, and risk management.

ANALYSIS OF THE PROBLEM-SITUATION AND PROPOSALS FOR INNOVATION/INTERVENTION/RECOMMENDATION

Although the "Nursing Home" project was conducted by certified professionals and aligned with the best practices proposed by the Project Management Institute (PMI, 2021), the results achieved did not meet the beneficiaries' expectations. The critical analysis of the project's minutes, reports, and operational records revealed that the rigidity of the initial scope and the absence of participatory mechanisms compromised the alignment between the delivered items and the real needs of the home's residents, especially regarding the objective of promoting improvements in quality of life.

The investigation used document analysis as the main method (Merriam & Tisdell, 2016), based on 16 formal meeting minutes, 8 biweekly progress reports, tracking spreadsheets, and institutional documents from the nursing home. Presential observation was also conducted in requirements gathering meetings and operational activities, allowing for a faithful reconstruction of the project's trajectory and the management practices employed. Additionally, a structured interview was conducted, following the methodological procedures recommended by da Silva, Penha, and Bizzarias (2022), with the project sponsor, a PMP (Project Management Professional) certified manager by the Project Management Institute (PMI, 2021), responsible for supervising the initiative. The interview sought to capture the managerial perspective on the scope delineation and the decisions made throughout the project. The inclusion of this managerial perspective helps to strengthen the data triangulation and offer an internal view on the decisions that shaped the project's scope.

From the initial meeting with the maintainer of the beneficiary institution, when the scope, goals, and responsibilities were formalized through signed minutes, to the final deliveries, the project followed a linear documentary governance structure, with periodic meetings and systematic production of records. This approach ensured traceability but proved ineffective in capturing and integrating subjective expectations, such as the emotional and social well-being of the elderly.

The formalization of the project occurred through an initial meeting between representatives of the institution responsible for conducting and executing the volunteer project and the representatives of the nursing home, in which the terms of the initial scope, strategic objectives, and responsibilities of each party were established. The project sponsor emphasized that "the scope definition process was conducted properly and aligned with best practices, in an initial meeting with signed minutes, which brought clarity about objectives, deliverables, and responsibilities". This perception reinforces the project's emphasis on documentary governance and formal control of decisions, aligning with traditional management best practices.

As a formal record, meeting minutes were written and signed by both parties, containing the main agreements, measurable goals, and evaluation criteria, a document that served as the legal and operational basis for all subsequent project development. From this initial milestone, a calendar of periodic follow-up meetings (held weekly) was established, whose minutes systematically recorded the progress of activities, challenges encountered, and decisions made, thus creating a documentary history that accompanied all phases of the project life cycle, from initial planning to execution and final evaluation.

This documentary governance structure aimed to ensure transparency in institutional relations and allow for the systematic monitoring of results. Each project stage produced specific documents, all chronologically linked to the minutes of the corresponding meetings. The documentary approach ensured the traceability of decisions and the monitoring of the execution of the initially agreed-upon activities.

Figure 2 presents the relationship between the documentation generated in the different project phases, as well as the main stakeholders involved.

Figure 2

Documents produced during the project phases and stakeholders involved.
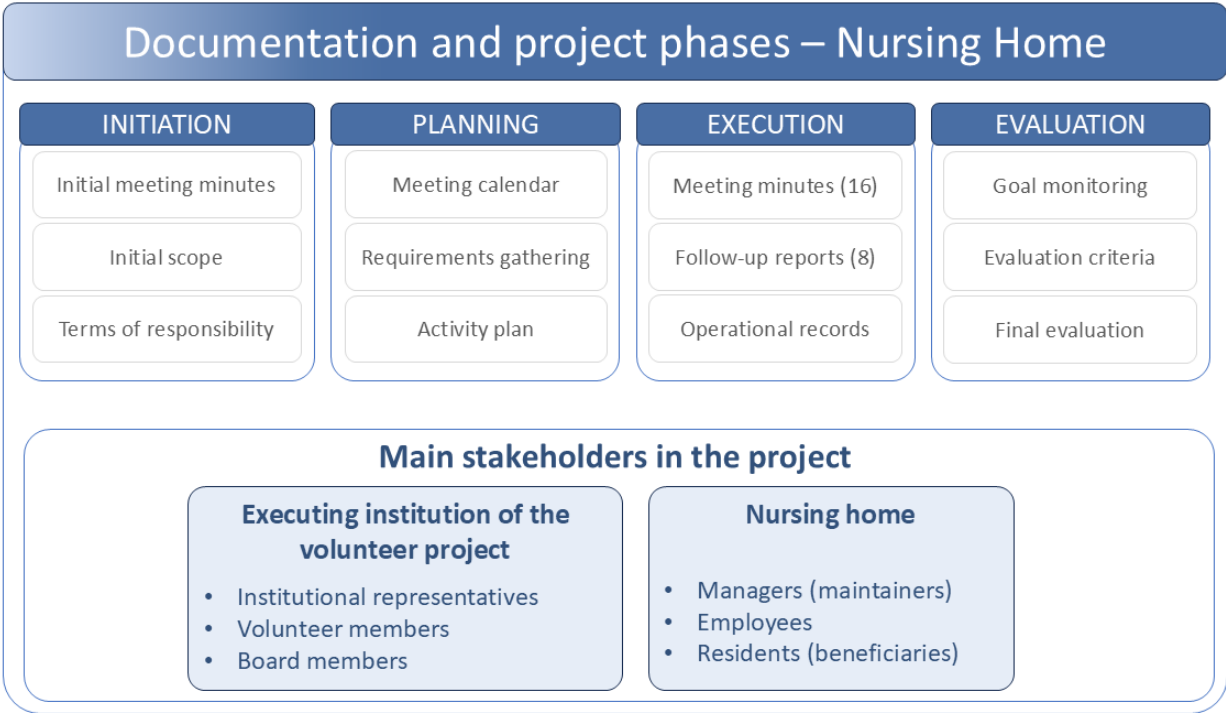
Fonte: elaboração própria (2025).

The document analysis helped to highlight the project's main limitation: the third item of the project scope, "promote improvements in the quality of life of the residents," was not adequately interpreted and operationalized by the volunteers due to its subjectivity, which demanded a more in-depth and participatory approach. The sponsor acknowledged the mismatch between the scope and the beneficiaries' expectations, observing that "we delivered bed linens and equipment, but the elderly expected recreational activities; however, these expectations were not formalized in the scope, therefore they do not constitute an execution failure". This statement highlights the management's emphasis on tangible and measurable results, while subjective dimensions representative of value to the elderly, such as social interaction and well-being, remained invisible in the project's formal structure.

The project members, conditioned to map tangible and quantifiable deliverables, limited the scope "promote improvements in the quality of life of the residents" to the donation of bed linens and bath towels, ignoring intangible dimensions such as emotional and social well-being. This simplification occurred because the volunteers, although certified in project management, failed to translate the stakeholders' subjective expectations into concrete actions, focusing only on material items that were easy to measure.

The residents of the nursing home, in turn, placed their expectations on activities that effectively promoted interaction and leisure, such as events, dance classes, music sessions, and outings. As they were not familiar with the dynamics of a project, they assumed that the volunteers would discuss their needs during interactions, adjusting the scope according to their demands. However, the rigidity of the project's premises, especially the impossibility of scope change after its formalization, prevented any subsequent adaptation, culminating in a disconnect between the deliveries made and the beneficiaries' expectations, demonstrating a significant gap between the formal scope and the value perceived by the stakeholders.

This failure highlighted the need for specific techniques and approaches for social projects, which require greater flexibility and continuous dialogue with stakeholders. The absence of an iterative process to capture subjective expectations resulted in frustration, as the volunteers did not adequately explore the project's third objective.

Figure 3 presents the WBS as it should have been elaborated by the project team, considering (highlighted) the deliverables for the scope "promote improvements in the quality of life of the residents".

Figure 3

. WBS of the project in consideration of the scope items not mapped by the project team (highlighted).
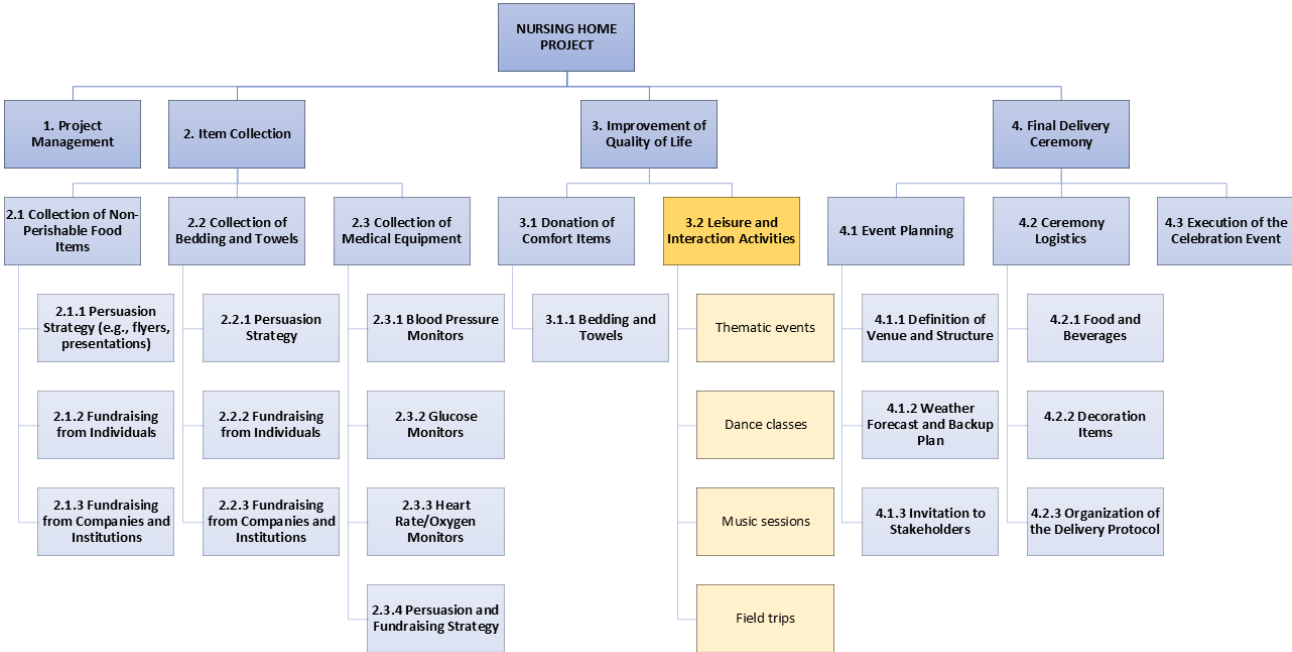
Source: Prepared by the authors (2025).

As medidas de intervenção adotadas pela equipeThe intervention measures adopted by the team and the project manager, although aligned with best practices according to the Project Management Institute (PMI, 2021), proved insufficient to ensure the project's success. The revision of the WBS and the introduction of the Scope Variance (SV) indicator as the main metric were late actions, implemented only in the final weeks of the schedule, when there was already a significant disconnect between the planned deliverables and the beneficiaries' expectations. Despite the effort to detail sub-activities and monitor deviations, the team failed to fully understand the complexity of the scope related to improving the residents' quality of life, limiting themselves to a restricted and quantifiable view.

The scope deviation analysis and the percentage of completion, although useful in conventional projects, were not sufficient to capture the complexity of the project's third objective. The intangible nature of the residents' expectations, which included recreational activities and social interactions, required a more qualitative and participatory methodology, which was not implemented. The team, conditioned to rigid scope management based on material deliverables, failed to adjust to these demands, even after the WBS revision.

Consequently, the interventions failed to align the beneficiaries' expectations with the deliveries made, highlighting a gap in the application of management practices adapted to social projects. The insistence on traditional standards, without considering the participatory dynamics necessary in this context, resulted in a late and incomplete understanding of the scope, compromising the overall success of the project and reiterating the limitations of traditional approaches in contexts with a strong subjective component (Svejvig & Andersen, 2015; Minnaert, 2012).

The results obtained from the project analysis demonstrated that the adoption of formal project management best practices, by itself, does not guarantee the success of initiatives with a strong subjective component. The scope definition, although formalized through minutes and initial agreements, proved insufficient to encompass the beneficiaries' expectations, especially regarding the improvement of the elderly's quality of life, an objective whose complexity required more interactive and participatory processes. In this regard, strengthening community participation in social projects should not be understood merely as a consultation and formalized registration mechanism, but as a continuous co-creation process that enhances the legitimacy and effectiveness of the initiatives. As recent studies demonstrate, co-creation allows for the integration of local knowledge and lived experiences, boosting social innovation and ensuring that project scopes are aligned with the community's real needs (Schillo & Robinson, 2017).

According to Clegg and Biygautane (2025), the definition and management of scope, especially for large-scale or social impact projects, is hindered by the subjective nature of the social context in which this type of project is embedded. Each stakeholder group has its own worldviews, interests, motivations, perceptions, and values, which shape their actions and how they perceive the project and its results, making it difficult to standardize and align what constitutes the project's "value" or "success" for everyone.

According to Minnaert (2012), the intangible and non-infrastructural impacts of projects receive less visibility and are less studied ; although these social effects are harder to document and measure, they are equally important. In the volunteer project, the absence of qualitative tools for collecting expectations, coupled with the rigidity of the scope and the impossibility of its revision, resulted in deliverables that did not reflect the real needs of the final stakeholders. The simplification of intangible deliverables into material goods compromised the project's effectiveness. Furthermore, the use of conventional indicators like Scope Variance (SV) was unable to adequately reflect the progress or social impact generated. The team demonstrated difficulty in adapting traditional control mechanisms to the dynamic and subjective nature of the social context, highlighting the need to develop specific competencies for conducting social projects and adopting metrics sensitive to the beneficiaries' experience.

It was observed, therefore, that the intangible character of part of the deliverables affected each phase of the project:

1. Planning phase: failure to capture subjective expectations (e.g., emotional well-being) by the project team members.

2. Execution phase: difficulty for the project team in measuring progress without quantitative metrics capable of providing clearer indications about the non-fulfillment of a relevant part of the scope.

3. Closing phase: frustration of the beneficiaries (nursing home residents) due to deliverables not aligned with their expectations.

The intangibility of the unmapped scope, reflected in the unfolding that occurred in the project phases, is also reinforced by the work of Svejvig & Andersen (2015) on the inadequacy of linear models in social contexts. According to the authors, a technocratic and rationalist viewpoint predominates in classic project management, characterized by simple models based on a life cycle and a linear process of planning, controlling, and evaluating which, in the case observed in this study, was insufficient to address a social project scope.

This pattern reinforces the findings of Clegg and Biygautane (2025) and Brunet et al. (2025), according to which the success of social and infrastructure projects depends not only on fulfilling technical scopes but also on social acceptance and the perception of value by the benefited community. Neglecting these dimensions can generate resistance, compromise public trust, and, ultimately, invalidate the project's stated objectives.

According to the sponsor, a relevant lesson learned would be to "strengthen the initial requirements gathering phase to ensure that expectations are translated into measurable deliverables". Even so, he maintained the defense of methodological rigor, stating that "participatory mechanisms, such as interviews or conversation circles, can be useful, as long as they result in objective and formalized requirements". Such observations illustrate the challenge of reconciling the technical objectivity of project management practices with social needs, as well as expectations and openness to emerging demands.

The study revealed the need for methodological innovations for social projects. The main proposals for intervention are:

1. Incorporation of iterative requirements gathering processes, with continuous feedback cycles that allow for re-evaluating and adjusting the scope based on interactions with beneficiaries.

2. Adoption of qualitative tools (e.g., in-depth interviews, focus groups, expectation mapping techniques) that allow for capturing the subjective dimensions of value and social impact.

3. Use of metrics sensitive to the social context, such as indicators of perceived well-being, satisfaction with interactions, and social inclusion, in addition to traditional technical indicators.

4. Training teams in relational and active listening skills, expanding the ability of project managers to deal with ambiguous contexts, multiple interests, and intangible deliverables (Brunet et al., 2025; Vera-Burau et al., 2025).

5. Controlled scope flexibility through formal mechanisms that allow for agreed-upon adjustments throughout the project life cycle, especially in initiatives with a strong presence of vulnerable stakeholders.

As a result, it becomes evident that the management of social projects requires an approach that combines the technical rigor of best practices with the flexibility and sensitivity necessary to operate in complex social realities. The analyzed experience reinforces that the effectiveness of projects with a strong subjective component is directly linked to their ability to incorporate multiple perspectives from the beginning and throughout all project phases.

In this direction, Frediani, Davel, and Ventura (2022) highlight that the role of socio-environmental project management is, therefore, to create the conditions for mobilized and trained people to exist to facilitate the convergence of interests, give continuity to organizational structures, and take on local leadership. This perspective reinforces the understanding that social project management must transcend the focus on point-specific deliverables, favoring the construction of local capacities and the social sustainability of the initiatives.

CONCLUSIONS AND TECHNOLOGICAL/SOCIAL CONTRIBUTION

This study aimed to analyze how difficulties in scope detailing in a social project can compromise its success, especially when traditional methodologies are applied in contexts of high subjectivity. From the analysis of a volunteer project case, it was verified that, even when conducted by trained teams and based on established project management standards, such as the PMBoK (PMI, 2021), social projects demand specific approaches that account for the intangible nature of some of their deliverables and the diversity of expectations among the involved stakeholders.

The analyzed case shows that the rigid and orthodox application of traditional management practices proves insufficient in contexts that require empathy, adaptability, and active participation of the beneficiaries. The partial failure of the project was mainly related to the team's inability to capture and adequately translate subjective expectations into meaningful deliverables, especially regarding the improvement of the quality of life of the nursing home residents, an objective that requires more qualitative and participatory approaches.

The main contribution of this study lies in proposing practical recommendations for scope management in social projects, gathered in Table 2. These recommendations include: adopting participatory planning; defining a flexible scope; using hybrid indicators (quantitative and qualitative); adopting hybrid management models; continuous scope review; and interdisciplinary team training. These measures aim to improve the alignment between deliverables and beneficiaries' expectations, as well as to increase the effectiveness and legitimacy of social interventions.

As a practical contribution, this study presents a set of recommendations for scope management in social projects. The first refers to **participatory planning, which involves stakeholders from the initial project phases**, ensuring their ideas and expectations are incorporated into the development plans. This process contributes to greater adherence, legitimacy, and alignment of expectations.

Another recommendation concerns the **flexible definition of scope**, which should avoid excessive rigidity and allow adjustments throughout the project life cycle, considering changes in context and emerging needs. This is justified by the fact that social projects are naturally dynamic, demanding adaptability to deal with internal and external influences. Also highlighted is the **alignment of expectations**, which consists of establishing the scope, success criteria, and expected benefits collaboratively and iteratively, based on a transparent dialogue between the executing organization and the various stakeholders. Such a measure fosters engagement and reduces the risks of deliverables misaligned with the values of those involved.

Regarding management models, the **adoption of hybrid approaches** is recommended, combining traditional project management practices with methodologies more sensitive to the particularities of social impact initiatives. This integration offers the necessary structure to deal with complex and constantly changing social environments. Furthermore, the **use of hybrid scope indicators** is suggested, which unite traditional metrics, such as the percentage of completed deliverables, with qualitative metrics, such as beneficiary satisfaction surveys. This combination expands the project's evaluation, capturing both technical efficiency and perceived effectiveness, especially in intangible deliverables. Another central point is **conducting continuous scope reviews**, through periodic sessions with stakeholders to assess progress, promote adjustments, and incorporate feedback. These reviews should extend even after the project's completion, in order to consider short, medium, and long-term impacts.

Finally, **team training** is recommended, composed interdisciplinarily, with project managers and professionals experienced in social work. The **training of external stakeholders**, such as authorities and local communities, is also relevant, so they can interact with the project and fully leverage the opportunities generated.

These guidelines, when applied, favor a more participatory, flexible, and sensitive scope management process to social specificities, increasing the effectiveness and legitimacy of the

projects.

As a practical contribution, the proposed recommendations can guide managers, third-sector organizations, and public or private institutions that develop social projects. By incorporating participatory mechanisms and context-sensitive indicators, the potential for impact and legitimacy of the initiatives is increased, favoring more sustainable interventions aligned with the values and needs of the served groups. However, as it is a single case study, the conclusions should not be generalized to all social projects. The absence of structured interviews with the final beneficiaries also constitutes a methodological limitation, as it restricts the depth of the analysis on expectations not captured documentarily. Nevertheless, a structured interview was conducted with the project sponsor. This interview allowed for an understanding of the managerial perspective and the decisions related to the scope, strengthening the study's methodological triangulation. However, the absence of other testimonies, especially those of the beneficiaries and volunteers, limited the full understanding of both the management difficulties faced and the perceptions of the social value achieved.

Future research could explore comparative studies between different types of social projects, investigating how contextual variables, such as the beneficiaries' profile, the nature of the deliverables, and participation mechanisms, influence the effectiveness of project implementation. In this sense, a promising line consists of examining more structured forms of community participation that advance towards co-creation practices, where beneficiaries contribute with specific opinions, act as active partners in defining project priorities, and actively participate in monitoring deliverables. Such a perspective, based on the work of Schillo & Robinson (2017), can offer alternatives for more inclusive management practices, capable of integrating local knowledge, assisting in the alignment between scope definition and stakeholder expectations, and consequently expanding the project's social impact over time.

Furthermore, it is recommended to investigate the use of agile methodologies adapted to social contexts, the formation and operation of multidisciplinary teams, and the application of traditional management tools adjusted to encompass the multiple perspectives and priorities of the involved stakeholders.

By highlighting the challenges and proposing ways to overcome them, this study reinforces the importance of integrating technique and social sensitivity in the management of socio-environmental impact projects, contributing to the advancement of practices in complex and human environments.

REFERENCES

Abidin, N. Z., & Pasquire, C. L. (2007). Revolutionize value management: A mode towards sustainability. International Journal of Project Management, 25(3), 275-282. https://doi.org/10.1016/j.ijproman.2006.10.005

Baba, S., Mohammad, S., & Young, C. (2021). Managing project sustainability in the extractive industries: Towards a reciprocity framework for community engagement. International Journal of Project Management, 39(8), 887-901. https://doi.org/10.1016/j.ijproman.2021.09.002

Babaei, A., Locatelli, G., & Sainati, T. (2023). Local community engagement as a practice: an investigation of local community engagement issues and their impact on transport megaprojects' social value. International Journal of Managing Projects in Business, 16(3), 448-474. https://doi.org/10.1108/IJMPB-10-2022-0224

Bandé, A., Ika, L. A., & Ouédraogo, S. (2024). Beneficiary participation is an imperative, not an option, but does it really work in international development projects? International Journal of Project Management, 42(1), Artigo 102561. https://doi.org/10.1016/j.ijproman.2024.102561

Brunet, M., Aubry, M., & Vaillancourt, J. (2025). Governance, social acceptability and organizational learning in public infrastructure projects. International Journal of Project Management, 43(2), 102-115. https://doi.org/10.1016/j.ijproman.2024.102345

Cicmil, S., & Gaggiotti, H. (2018). Responsible forms of project management education: Theoretical plurality and reflective pedagogies. International Journal of Project Management, 36, 208-218. https://dx.doi.org/10.1016/j.ijproman.2017.07.005

Cicmil, S., Williams, T., Thomas, J., & Hodgson, D. (2006). Rethinking project management: Researching the actuality of projects. International Journal of Project Management, 24(8), 675-686. https://doi.org/10.1016/j.ijproman.2006.08.006

Coelho, M. Q. (2004). Indicadores de performance para projetos sociais: A perspectiva dos stakeholders. Alcance, 11(3), 423-444.

da Silva. L. F., Penha, R., Bizzarias, F. S. (2022, set./dez.). Entrevistas aplicadas em pesquisas qualitativas: da aplicação da entrevista à análise dos dados. Editorial. Revista de Gestão e Projetos (GeP), 13(3), 1-9. https://doi.org/10.5585/gep.v13i3.23326

Di Maddaloni, F., Meira, L. H., de Andrade, M. O., de Melo, I. R., Castro, A., & Locatelli, G. (2025). The dark legacy of megaprojects: A case of local disengagement, missed opportunities, and social value dissipation. International Journal of Project Management, *43*, Artigo 102676. https://doi.org/10.1016/j.ijproman.2025.102676

Diallo, A., & Thuillier, D. (2004). The success dimensions of international development projects: The perceptions of African project coordinators. International Journal of Project Management, 22(1), 1-12. https://doi.org/10.1016/S0263-7863(03)00008-5

Eder, S., Conforto, E. C., Amaral, D. C., & Silva, S. L. (2015). Diferenciando as abordagens tradicional e ágil de gerenciamento de projetos. Production, 25(3), 482-497. http://dx.doi.org/10.1590/S0103-65132014005000021

Ebrahim, A., & Rangan, V. K. (2014). What impact? A framework for measuring the scale and scope of social performance. California Management Review, 56(3), 118-141. https://doi.org/10.1525/cmr.2014.56.3.118

Fernández-Sánchez, G., & Rodríguez-López, F. (2010). A methodology to identify sustainability indicators in construction project management – application to infrastructure projects in Spain. Ecological Indicators, 10(6), 1193-1201. https://doi.org/10.1016/j.ecolind.2010.04.009

Frediani, D. A., Davel, E. P. B., & Ventura, A. C. (2022). O desafio da autonomia em projetos socioambientais: A tecnologia de gestão dialógica. Gestão e Desenvolvimento, 19(1), 179-204. https://doi.org/10.25112/rgd.v19i1.2725

Friedman, A. L., & Miles, S. (2006). Stakeholders: Theory and Practice. Oxford University Press.

Gitamo, M. M. (2018). Project management implementation practices in provision of reproductive health services in selected health facilities in Nairobi county. Jomo Kenyatta University of Agriculture and Technology.

Ika, L. A. (2012). Project management for development in Africa: Why projects are failing and what can be done about it. Project Management Journal, 43(4), 27-41. https://doi.org/10.1002/pmj.21281

Junges, V. de C., Campos, S. A. P. de, Becker, R. G., & Gallon, S. (2020). Projetos de desenvolvimento social como espaço para a resiliência em empresas de base comunitária voltadas à reciclagem. Alcance, 27(3), 312-325. https://doi.org/10.14210/alcance.v27n3(Set/Dez).p312-325

Kang, K. H., Lee, S., & Yoo, C. (2016). The effect of national culture on corporate social responsibility in the hospitality industry. International Journal of Contemporary Hospitality Management, 28(8). https://doi.org/10.1108/IJCHM-08-2014-0415

Kivilä, J., Martinsuo, M., & Vuorinen, L. (2017). Sustainable project management through project control in infrastructure projects. International Journal of Project Management, 35(6), 1167-1183. https://doi.org/10.1016/j.ijproman.2017.02.009

Luo, G., Tao, M., Zhong, S., & Xiao, C. (2024). Practical exploration of eco-geological survey mapping in Qinghai-Tibet Plateau: Framework, standard and preliminary cost estimation. Sustainability, 16(1), 176. https://doi.org/10.3390/su16010176

Merriam, S. B., & Tisdell, E. J. (2016). Qualitative research: A guide to design and implementation. Jossey-Bass.

Minnaert, L. (2012). An Olympic legacy for all? The non-infrastructural outcomes of the Olympic Games for socially excluded groups (Atlanta 1996–Beijing 2008). Tourism Management, 33(2), 361-370. https://doi.org/10.1016/j.tourman.2011.04.005

Motta, G. da S. (2022). O que é um artigo tecnoló-

gico? Revista de Administração Contemporânea, 26(Sup. 1), e220208. https://doi.org/10.1590/1982-7849rac2022220208.por

Moulid, H. M., Muchelule, Y. W., & Wechuli, W. T. (2021). Influence of stakeholders management on performance of coast development authority projects in Kenya. Strategic Journals, 8(2), 158-177. http://www.strategicjournals.com

Nava, S., Chalabi, Z., Bell, S., & Moore, G. (2025). Multistakeholder sustainability assessment of housing estate regeneration schemes: Analysis of a mixed methods survey. Environmental Impact Assessment Review, 112, Artigo 107805. https://doi.org/10.1016/j.eiar.2025.107805

Park, K., & Kim, B. (2024). Effects of individual client's competencies on construction project performance: Mediating participation attitude and partnership. Administrative Sciences, 14(3), Artigo 40. https://doi.org/10.3390/admsci14030040

Pheng, L. S. (2017). Project Life Cycles, Stakeholders and Organizations. Project Management for the Built Environment, 15-26. doi:10.1007/978-981-10-6992-5_2

Project Management Institute. (2021). A guide to the project management body of knowledge (PMBOK® Guide) (7a ed.).

Schillo, R. S., & Robinson, R. M. (2017). Evaluating co-creation in social innovation projects. The Business & Management Review, 8(4), 68-77.

Stewart Clegg, & Biygautane, M. (2025). Politics of sensemaking, temporalities and multiplicities in major projects. International Journal of Managing Projects in Business, 18(8), 22-49. https://doi.org/10.1108/IJMPB-10-2024-0241

Svejvig, P., & Andersen, P. (2015). Rethinking project management: A structured literature review with a critical look at the brave new world. International Journal of Project Management, 33(2), 278-290. https://doi.org/10.1016/j.ijproman.2014.06.004

Van Offenbeek, M. A. G., & Vos, J. F. J. (2015). An integrative framework for managing project issues across stakeholder groups. International Journal of Project Management. https://doi.org/10.1016/j.ijproman.2015.09.006

Vera-Burau, A., Sanmiquel Pera, L., & Bascompta Massanes, M. (2025). Integration of quantitative ESG factors in a mining project: Case studies of a quarry. Journal of Cleaner Production, 501, Artigo 145304. https://doi.org/10.1016/j.jclepro.2025.145304

Yin, R. K. (2018). Qualitative research from start to finish (2a ed.). Guilford Publications.

Zwikael, O., & Meredith, J. R. (2019). Effective organizational support practices for setting target benefits in the project front end. International Journal of Project Management, 37, 930-939. https://doi.org/10.1016/j.ijproman.2019.08.001