



**Social Economy
Transition Skills**



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Introduction

The present document contains the final version of the training program developed under the EU-funded **Social Economy Transition Skills** (SETS) project. The project was implemented over the period 2024–2025 with the objective of strengthening the capacity of Social Economy Organisations (SEOs) and their enabling ecosystems to respond effectively to the twin green and digital transition.

The twin transition – the combined **green transition** (environmental sustainability) and the **digital transition** – provided the knowledge base underpinning the creation of these training materials. By integrating green and digital skills, social economy organizations can better align their economic activities with the EU’s objectives for climate neutrality, social inclusion, and competitiveness, while remaining firmly rooted in their people-centred mission. Building transition skills enhances organizational resilience, supports democratic governance through digital tools, and increases access to EU funding and partnerships that increasingly require combined social, environmental, and digital innovation. Green and digital skills enable the development of an integrated, “twin” perspective in which SEOs can champion their inclusive and democratic features to shape technologically intensive contexts.

In this way, the twin transition is not only a technological or environmental shift, but a skills-driven transformation that positions the social economy as a key driver of a fair, inclusive, and sustainable European future.

Therefore, this manual is designed to support the training of trainers working within social economy organizations, providing a tested learning path and training content to help them deliver high-quality, impactful capacity-building for SEOs. The manual focuses on enabling trainers to replicate and adapt the training content to different contexts and audiences. By using this resource, trainers will strengthen their facilitation skills and ensure

consistency in learning outcomes. A modular training program including three courses was developed for different target audiences. The modular approach enables other trainers to flexibly

In the remaining sections of this manual, we briefly outline the learning path employed for the validation of the different courses in the training program, a few implementation guidelines and a general overview of the content, learning objectives and structure of the three courses:

- **Artificial Intelligence** – 3 modules, 13 Lessons.
- **Communicating and Collaborating in Digital Environments** – 3 modules, 19 lessons.
- **Social Economy and Impact Management** – 4 modules, 18 lessons.

Learning approach

This section outlines the pedagogical methods and learning path adopted for this educational path.

The approach is centred on flexibility and accessibility, ensuring the curriculum allows participants to organise a self-paced training journey while fostering meaningful connections to the subject matter. Thus, the training was primarily conceived for implementation via a modular, remote approach. To facilitate flexible learning, the three courses are meant to be delivered via a digital platform featuring concise video lessons that allow learners to progress at their own pace. However, the SETS team also recognised the value of peer-learning and interaction in professional development. Therefore, during the training piloting, the SETS team held a few live sessions, both online and in person. Recordings of the webinars and the in-person meeting format are available upon request. In these instances, conducting the introductory and concluding sessions in person has proven highly effective in building a strong sense of community and establishing durable professional networks among social economy actors, as demonstrated by the collaborative ties formed between participants in France and Slovenia.

Each individual lesson is structured around a core video component, with a maximum length of 10 minutes. To deepen the educational experience, the platform hosts a repository of supplementary materials, including PDF articles and curated web links. While much of this content is provided for optional further study, specific readings are designated as mandatory. The final assessment of learning is based strictly on these mandatory readings and the core content of the video lessons. To provide a specific angle on certain topics where no open-source materials were available, the SETS team developed videos from scratch. Again, they can be used as an open resource upon request through the SETS website. All the other materials are open-access documents available online; this was a fundamental driver in selecting the different sources to guarantee the maximum course accessibility, consistent with the needs of social economy organisations. Indeed, they usually suffer a general lack of time and financial resources and the opportunity to attend a completely free and open course was considered the most effective way to support their upskilling and reskilling.

Each learning session is immediately followed by practical exercises. These activities are designed to encourage active engagement and range from automated multiple-choice questions to more complex tasks, such as open-ended reflections and writing exercises that require a synthesis of the concepts presented. A lesson is not labelled as finished if the exercises are not submitted.

The evaluation process involves a combination of automated and manual oversight. While some platforms (depending on the one chosen) can provide immediate feedback on objective questions, the person or organisation managing the course is responsible for reviewing and correcting open-ended and conceptual exercises. This ensures that participants receive qualitative feedback on their more reflective work. Trainers are free to adjust the assessment methods according to the available supervision effort.

Ultimately, the course is considered complete only when all modules have been finalized and all evaluative tasks have been reviewed and validated. This structure allows learners the freedom to pause and resume their studies at any time, providing a truly personalized and flexible learning journey that accommodates individual time constraints.

Based on successful pilot implementations within the SETs project, the methodology can be adapted for large scale organizational use through a blended learning format.

Choosing the right platform

The chosen platform must serve as a bridge between the instructional content and the user experience, ensuring that the pedagogical goals of flexibility and interactivity are fully met. In this part of the document, the basic functionality needed to choose a platform will be outlined.

The core of the digital infrastructure must prioritize robust multimedia integration and efficient resource management. Given that the curriculum utilises a hybrid format comprising original videos created by the SETS team and external resources from providers such as YouTube, the platform must provide seamless support for both native video hosting and third-party embedding. This dual capability ensures a consistent viewing experience without forcing users to leave the learning environment.

Furthermore, the backend interface must allow administrators to easily upload and manage supplementary materials, such as PDF documents and web links, while the frontend must provide a streamlined interface for participants to access and download these resources.

Interactivity and assessment tracking are equally critical to the platform's functionality. To facilitate the practical exercises that accompany each lesson, the system must support a bidirectional workflow for assignments. This includes a frontend interface where learners can upload their

completed work, such as open-ended reflections or writing tasks, and a mechanism for instructors to return corrected versions and qualitative feedback.

A functional, intuitive user experience is a crucial requirement: the platform must allow rapid navigation between course modules, enabling learners to revisit previous lessons effortlessly. Additionally, an automated progress-saving feature is essential to support the course's self-paced nature, ensuring participants can resume their studies exactly where they left off.

Beyond these fundamental requirements, several advanced features are highly encouraged to enhance community spirit and administrative efficiency. While not mandatory, we recommend the following features:

- Facilitating group chats among participants would significantly bolster the collaborative environment established during in-person sessions.
- Similarly, integrated Q&A forms would allow for direct communication between learners and the course manager, creating a structured support channel.
- From an administrative perspective, the inclusion of comprehensive dashboards and data panels would be highly beneficial. Such tools allow managers to group and review all results and assignments for a specific individual in a single location, simplifying the evaluation process and the overall oversight of the learning journey.

Courses

Artificial intelligence for social good

**Communication and collaboration in
digital environments**

**Social economy and Impact
management**

Artificial intelligence for social good

Overview

Course description and aim

The course aims to equip participants with the knowledge and skills to effectively integrate artificial intelligence tools within their organisations and leverage the AI potential to strengthen the generation of societal value. It covers both practical and ethical aspects of AI, ensuring that participants can implement these technologies responsibly while understanding their impact on operations and society. Participants will learn about different types of AI, their applications, and the potential risks associated with their use. The course also offers AI-based solutions to specific challenges SEOs experience in their daily operations and strategic planning.

Skills gap area

The course is designed to equip **SEOs' managers** with an overview of the notions and tools allowing the correct implementation of artificial intelligence within their organizations.

This is consistent with the following DIGCOMP areas:

- DIGCOMP - 1.2 (Evaluating data, information and digital content)
- DIGCOMP - 3.2 (Integrating and re-elaborating digital content)
- DIGCOMP - 4.4 (Protecting the environment)
- DIGCOMP - 5.2 (Identifying needs and technological responses)

Modules

The course includes the following modules:

1. General culture of AI

The module provides SEO managers with a synthetic yet comprehensive overview of the fundamentals of Artificial Intelligence. Given the complexity of the topic, the course helps participants to acquire a general sense of how AI works and the appropriate technical vocabulary. Moreover, the module thoroughly addresses the potential societal consequences of AI, including ethical considerations and potential exclusionary trajectories. This is meant to prepare managers to make informed decisions about integrating AI into their organisations, without displacing the social and ethical values implied by the SEO's mission.

2. AI as an enabler in SEOs' decision-making

This module explores organizational challenges and potential risks associated with AI implementation in SEOs. The module also aims to offer a critical perspective on the use of AI in decision-making. Given the relevance of SEOs' societal mission, it is crucial for managers to wisely assess the potential negative consequences of AI, including reputational risks and the displacement of their social value-creation processes. The first two lessons consider how AI can help managers mitigate human biases in decision-making and comply with data management constraints, ensuring fairness in hiring, resource allocation, and beneficiary selection. Lessons three and four support SEOs managers in considering AI-related risks: the environmental impact of using (or overusing) AI, the management of AI-generated content and its intellectual property.

3. How can AI help SEOs?

This last module offers a very operational angle by providing SEOs managers with a comprehensive overview of specific AI tools that can enhance organizational efficiency and ease decision-making processes. It covers tools that support strategic decision-making, streamline grant-seeking and fundraising, and automate repetitive tasks. By exploring these tools, managers will gain the knowledge to make informed decisions about which AI solutions best align with their organization's goals, ultimately concluding the course with the ability to develop an AI strategy which is coherent with the organization's mission.

Modules' content

The course includes **3 modules** and **13 lessons**.

1. General culture of AI

The module includes the following lessons:

1. *AI for social good: origins and trajectories*
2. *AI from A to Z*
3. *Types of AI*
4. *Responsible AI and ethics*

2. AI as an enabler in SEOs' decision-making

The module includes the following lessons:

5. *Over-reliance on AI*
6. *Navigate Intellectual Property in Generative AI*
7. *Ensuring Privacy in the age of AI*
8. *Overcoming biases thanks to the responsible use of AI*
9. *Reduce AI and Digital Carbon Footprint*

3. How can AI help SEOs?

The module includes the following lessons:

10. *Unlock your organisation's potential with AI*
11. *AI tools to support decision-making*
12. *Use AI to help organisations in grant-seeking and fundraising*
13. *AI tools to automate tasks*

General culture of AI

The module includes the following lessons:

1. *AI for impact: origins and trajectories*
2. *AI from A to Z*
3. *Types of AI*
4. *Responsible AI and ethics*

Lesson 1

AI for social good: origins and trajectories

Expected reading time: 18 minutes

Main page content

To start our lesson, we propose a video titled "A Brief History of Artificial Intelligence - A Journey Through Time (2023)" from the Technological Time Warp channel, which offers a concise overview of the history and evolution of Artificial Intelligence (AI). The film traces AI's origins from Greek myths, through the coining of the term in 1956 and early programs, up to the "AI winter" of the 1970s and 80s. It then explores the resurgence in the 1990s with neural networks and machine learning, culminating in the deep learning advancements that have led to today's virtual assistants and autonomous vehicles, anticipating an even brighter future for this technology.

You can watch the video here: <https://www.youtube.com/watch?v=VnUGxU0jD34>

Ancient Philosophies and Early Ideas

Artificial Intelligence (AI) is transforming industries worldwide, including social economy organizations (SEOs) that aim to create positive social impact while making profit alongside it.

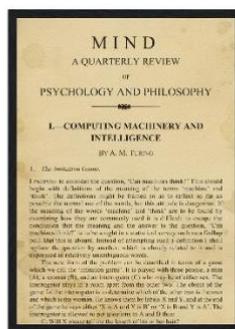
Understanding the history of AI can help your social enterprise leverage these technologies effectively to enhance its mission. AI has a rich and complex history that spans centuries, evolving from philosophical musings about the nature of thought to the sophisticated algorithms and systems we see today. It has evolved from theoretical ideas and science fiction concepts to a transformative technology reshaping industries, societies, and everyday life. This exploration of AI's history is divided into several key periods, each marked by significant developments and milestones.

The concept of artificial intelligence isn't new; it has roots in ancient philosophy. Civilizations such as the Greeks and Egyptians imagined mechanical men and automatons, laying early groundwork for the idea of machines that could think or act autonomously. Philosophers like Aristotle pondered the nature of knowledge and reasoning, which laid the groundwork for logical thinking and problem-solving: skills essential in any organization, including SEOs.

During the 17th and 18th centuries, thinkers like René Descartes and Thomas Hobbes introduced ideas about human cognition, logic, and mechanistic thought, proposing that thought itself could potentially be replicated in machines. This era laid the intellectual groundwork for later scientific pursuits.

The Dawn of Computer Science (1930s – 1940s)

The invention of programmable digital computers in the 1940s marked a significant turning point. Theoretical work by figures like Alan Turing laid the foundation for machine intelligence. In 1950, Turing published "Computing Machinery and Intelligence," introducing what is now known as the Turing Test: a criterion for determining whether a machine can exhibit intelligent behavior indistinguishable from that of a human.



Alan Turing’s “Computing machinery and intelligence”

The Birth of AI: A New Discipline Emerges (1950s)

The term "artificial intelligence" was coined by John McCarthy in 1955 during a workshop at Dartmouth College, which is widely regarded as the birthplace of AI as an academic discipline. This workshop brought together leading thinkers, including Marvin Minsky, Claude Shannon, and Nathaniel Rochester, who aimed to explore the potential for machines to simulate aspects of human intelligence.

During this period, several foundational developments occurred:

- **Logic Theorist (1955):** Developed by Allen Newell and Herbert A. Simon, this program could prove mathematical theorems, demonstrating early problem-solving capabilities that can be applied to complex social issues.
- **LISP (1958):** John McCarthy developed LISP, a programming language that became central to AI research. Understanding programming languages can empower employees to engage with AI tools effectively.
- **Perceptron (1958):** Frank Rosenblatt created this early neural network model, which could learn from data and laid the groundwork for modern neural networks.

For SEOs and other organizations, this means harnessing data-driven insights to enhance services and outreach efforts.



Marvin Minsky, Claude Shannon, Ray Solomonoff and other scientists at the Dartmouth Summer Research Project on Artificial Intelligence

The Golden Years of AI: Optimism and Innovation (1956-1974)

The late 1950s through the 1960s is often referred to as the "Golden Age" of AI. Enthusiasm for AI research surged during this time, leading to significant advancements:

- **ELIZA (1966):** Joseph Weizenbaum developed this early chatbot that could engage users in conversation, demonstrating natural language processing capabilities. SEOs can utilize similar technologies for customer service or community engagement.
- **Shakey (1966):** The first mobile robot capable of reasoning about its actions was developed at Stanford Research Institute, combining various AI technologies. This innovation highlights how robotics can be integrated into social programs, such as assisting individuals with disabilities.
- **Expert Systems:** Tools like DENDRAL demonstrated how AI could solve specialized problems, paving the way for applications in healthcare and environmental management, areas often addressed by SEOs.

Despite these advancements, challenges began to emerge. The complexity of replicating human-like intelligence proved more difficult than anticipated.

The First AI Winter: Challenges and Setbacks (1974-1980)

The initial excitement surrounding AI led to inflated expectations that could not be met. Criticism from researchers like James Lighthill highlighted the shortcomings in AI research, leading to a significant reduction in funding from both U.S. and British governments. This

period saw a decline in interest and investment in AI research, termed the "AI Winter", as many projects were abandoned or scaled back dramatically.

Renaissance and Second AI Winter: Practical Applications Emerge (1980-1993)

The early 1980s saw a resurgence in interest due to advances in expert systems and commercial applications. Companies began investing heavily in AI technologies:

- **Commercialization:** Companies began investing heavily in AI technologies tailored for specific industries.
- **Parallel Computing:** Innovations in computing power allowed for more complex calculations necessary for advanced AI systems.

However, by the late 1980s, enthusiasm waned again as expert systems failed to deliver on their promises. This led to another downturn in funding and interest, known as the second "AI Winter".

Intelligent Agents and Resurgence: Practical Tools for Social Impact (1993-2011)

The 1990s marked a shift towards practical applications of AI rather than attempts to replicate human intelligence fully. Researchers focused on developing intelligent agents capable of performing specific tasks effectively, such as:

- *Deep Blue (1997):* IBM's chess-playing computer defeated world champion Garry Kasparov. This milestone illustrates how specialized AI systems can outperform humans in specific tasks.
- *Natural Language Processing:* Advances continued with systems like IBM's Watson, which later competed successfully on "Jeopardy!" in 2011. These technologies can be harnessed for data analysis or community outreach programs.

This period also saw significant progress in machine learning techniques that can be applied directly within organizations to analyze data trends and improve service delivery.



Kasparov plays against Deep Blue

Deep Learning and Big Data Era: Empowerment and Transformation (2011-2020)

Since 2011, advancements in deep learning, a subset of machine learning, have transformed the landscape of AI:

- **Neural Networks:** Techniques such as convolutional neural networks (CNNs) enabled breakthroughs in image recognition and natural language processing. These technologies allowed AI systems to process and understand complex data more effectively, leading to applications in areas like medical imaging analysis and voice assistants.
- **Big Data:** The explosion of digital data provided vast resources for training sophisticated models, leading to significant improvements in AI performance across various domains.
- **Widespread Applications:** AI technologies became increasingly integrated into everyday life through applications like personal assistants (e.g., Siri, Alexa), facial recognition systems, and autonomous vehicles.

For SEOs, this decade brought new opportunities to leverage these powerful tools. They could harness neural networks for initiatives like identifying needs within communities through data analysis or improving the efficiency of resource allocation. The availability of Big Data meant SEOs could focus on how to collect and utilize data effectively to inform decision-making processes that align with their mission, enhancing transparency and accountability in their impact measurement.

wildlife.ai

Wildlife AI is a cutting-edge organization that employs artificial intelligence to address critical challenges in wildlife and ecosystem conservation. Their technology relies on analyzing massive volumes of data collected from various sources: they utilize networks of acoustic sensors, strategically placed camera traps, and drones equipped with high-resolution cameras to gather information in the field.

AI plays a crucial role in processing this data: advanced algorithms can identify animal species through image or sound recognition, monitor their movements and behaviors, and even detect illicit activities such as poaching or illegal deforestation. For instance, AI can alert rangers in real-time if it detects unauthorized vehicles or individuals in protected areas, or if it identifies noise patterns suggesting illegal logging. This automated monitoring and analysis capability allows for much faster and more effective conservation interventions compared to traditional methods, optimizing resource allocation and significantly contributing to the protection of endangered species and the maintenance of global biodiversity. They are able to transform raw data into actionable insights for conservationists.

The Age of Generative AI and AI-Native Organizations (2020-Present)

The period from 2020 to today has been marked by the rapid advancement and widespread accessibility of generative AI, further revolutionizing the capabilities of AI. Generative models capable of creating content ranging from text to images (e.g., GPT-3, DALL-E) have emerged, opening new frontiers for creativity, communication, and problem-solving. This era has also seen a heightened focus on the ethical implications of AI and the concept of "AI-native" organizations.

For social economy organizations, this translates into unprecedented potential. The World Economic Forum's white paper "AI for Impact: The Role of Artificial Intelligence in Social Innovation" (2024) highlights how generative AI presents a significant opportunity for social innovators to ethically integrate AI into their business models and operations to enhance their impact. Given that the social economy accounts for 7% of global GDP, generative AI has the potential to contribute an additional \$182 billion to \$308 billion in value to this sector annually. SEOs can now leverage generative AI for enhancing communication strategies, creating tailored outreach efforts, or even automating aspects of content creation for fundraising and awareness campaigns.

Moreover, the concept of an "AI-native social impact organization" has gained prominence. Unlike traditional organizations that may adopt AI incrementally, an AI-native social impact organization is designed from the ground up with AI as a foundational element, inherently

integrating AI technologies into its core operations, strategies, and services to achieve its mission of creating positive social change. This integration enhances the organization's capacity to address social issues more effectively, efficiently, and sustainably. Embracing this approach allows SEOs to move beyond mere adoption and truly embed AI into their DNA, maximizing their social impact in an increasingly data-driven world.



Aira is an AI-powered service (and human-assisted technology) that provides real-time visual assistance to individuals who are blind or have low vision. It operates through a combination of mobile technology (smartphones, smart glasses) and highly trained human operators ("Aira Agents") supported by artificial intelligence systems.

When Aira user needs assistance (for example, to read a label, navigate an unfamiliar environment, identify objects, or understand complex visual information), they connect with an Aira Agent via a live video call. The Agent can see what the user sees through their device's camera. Here, AI plays a crucial role: it can assist the agent with text recognition (OCR), object identification (computer vision), and advanced navigation (GPS), enabling the agent to provide precise and detailed instructions to the user. This hybrid human-AI system not only enhances the autonomy and safety of individuals with visual impairments but also offers a level of independence and access to information that was previously difficult to obtain. Aira exemplifies how AI can be used to overcome physical barriers and significantly improve social inclusion, providing an essential service that has a direct and profound impact on the daily lives of its users.

Future Directions

As we look ahead, the future of AI brings challenges and opportunities that are particularly relevant for SEOs:

- **Ethical Considerations:** As AI becomes more pervasive, discussions around ethics, bias in algorithms, privacy concerns, and regulatory frameworks are increasingly important. SEOs must prioritize ethical considerations when implementing AI solutions to maintain trust within the communities they serve. This includes ensuring fairness, transparency, and accountability in AI deployment.
- **AI for Impact:** a real value lies in actively applying AI to amplify opportunities to generate social impact. By integrating AI solutions with a clear focus on ethical implementation, data-driven decision-making, and strategic partnerships, social enterprises can enhance efficiency, reach wider audiences, and develop innovative

solutions to complex societal challenges. Embracing AI is about leveraging intelligent tools to better serve communities, maximize resource effectiveness, and ultimately achieve a more profound and sustainable positive change in the world.

The Role of Artificial Intelligence in Social Innovation

AI for Impact is the use of AI capabilities to address societal challenges, improve public welfare and advance sustainable development, prioritising social value creation over purely commercial objectives.

The sources provide a multi-dimensional definition of AI's role in this field:

- **A Scientific Tool for Decision-Making:** AI is defined as a method for achieving a more scientific understanding of social projects. It allows innovators to model circumstances, run simulations via **Agent-Based Modelling (ABM)**, and predict outcomes to reduce costs and improve real-time decision-making.
- **A Humanistic and Inclusive Approach:** More recent definitions move "beyond the noise" of technical efficiency and algorithmic complexity to focus on **technological humanism**. This approach defines AI as a tool for fostering **inclusive, decentralized, and equitable solutions** that specifically address global inequalities and digital justice.
- **A Sociotechnical System:** AI in social innovation is treated as a system inextricably linked to the stakeholders and context in which it is embedded. It is not a standalone "magic tool" but a technology that must be calibrated to local needs through collaboration and the co-creation of solutions.
- **An Enabler of Social Good and SI Drive:** Specifically, it focuses on how AI and digital technologies can **drive social innovation**, particularly in underserved or marginalised communities, to reduce global poverty.

The application of AI in social innovation is further defined by its response to two critical factors: **uncertainty** and **stakeholder conflict**. Depending on these levels, AI takes on different strategic definitions, such as a vehicle for **social entrepreneurship** (when uncertainty is high) or a mechanism for building **stakeholder capital** and social contracts (when conflict is high). Ultimately, the sources suggest that the most effective definition of AI in this space is one that prioritises **digital justice and community-driven governance** over purely commercial or technical gains

According to a recent World Economic Forum study, the most common applications are in **healthcare, environmental sustainability, and economic empowerment, with healthcare alone accounting for roughly one-quarter of AI use cases**. Social innovators primarily leverage machine learning, natural language processing and predictive analytics to enhance efficiency, enable real-time decision-making and deliver more personalized

interventions, often in low-resource contexts. On the other side, persistent barriers to adoption include limited access to quality data, technical skills gaps, high implementation costs, ethical risks such as algorithmic bias, and a notable gender gap in AI leadership.

Despite these challenges, AI for Impact demonstrates strong potential to scale social innovation by automating routine processes, expanding access to critical information and supporting evidence-based solutions aligned with the Sustainable Development Goals.

[Here](#) you can find around 300 examples of AI in social economy organizations and social innovation.

Verification of the participant's understanding

Format: Multiple-choice questions

Question 1

Who coined the term "artificial intelligence" and is often regarded as the founder of AI as an academic discipline?

- A. Alan Turing
- B. John McCarthy
- C. Marvin Minsky
- D. Frank Rosenblatt

Question 2

Which of the following AI milestones marked the creation of an early neural network model in 1958?

- A. ELIZA
- B. Perceptron
- C. Deep Blue
- D. c

Question 3

What significant event in the history of AI is referred to as the "AI Winter"?

- A. The invention of programmable digital computers in the 1940s
- B. The emergence of deep learning and big data in the 2010s
- C. The development of expert systems in the 1980s
- D. A period of reduced funding and interest in AI due to unmet expectations

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. AV Playbook. Becoming an AI-Native Social Enterprise. <https://avplaybook.com/becoming-an-ai-native-social-enterprise-67575c315562>. Accessed July 18, 2025.
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Lesson 2

AI from A to Z

Expected reading time: 20 minutes

Main page content

Artificial Intelligence (AI) is a rapidly evolving field transforming every aspect of our lives and work. Understanding its specific language is fundamental to navigating this complex landscape and fully harnessing its potential.

This glossary aims to provide a clear and concise resource of the key terms and fundamental concepts that define AI, from its theoretical bases to its most advanced applications. Whether you're a professional, a student, or simply curious, this tool will help you decipher AI jargon, facilitating a deeper understanding and application of these revolutionary technologies. The terms are organized alphabetically for easy reference, making this glossary an indispensable companion on your journey to learn about Artificial Intelligence.

Glossary in alphabetical order

- **Activation Function:** In a Neural Network, this is like a switch or a filter that decides if a neuron should be "activated" and send a signal forward. It's a mathematical rule that takes the input from a neuron and turns it into an output. It helps the network learn complex, non-straightforward patterns.
 - Example: Think of a light switch in your house. The activation function decides if the light (output) turns on based on whether you flip the switch (input) past a certain point.
- **Algorithm:** A step-by-step recipe or set of instructions that a computer follows to solve a problem or complete a task. In AI, these recipes tell machines how to learn, process information, and make decisions.
 - Example: The steps you follow to bake a cake, or the instructions a GPS gives you to reach a destination, are both algorithms.
- **Artificial General Intelligence (AGI):** This is a hypothetical type of AI that can understand, learn, and perform *any* intellectual task that a human being can. It's

often called "strong AI" because it would possess reasoning, problem-solving, and learning abilities across a vast range of situations, not just specific ones.

- Example: Unlike an AI that only plays chess, an AGI could play chess, write a novel, perform surgery, and understand human emotions, all interchangeably.
- **Artificial Intelligence (AI):** This is the broad field of computer science focused on creating machines that can "think" or act in ways that typically require human intelligence. This includes tasks like learning from experience, solving problems, making decisions, understanding language, and recognizing objects.
 - Example: Your phone's voice assistant (like Siri or Google Assistant) or a car that can park itself are examples of AI in action.
- **Automation:** This refers to using technology to make systems or processes operate by themselves, without constant human intervention. AI often makes automation smarter and more flexible.
 - Example: A factory assembly line where robots perform tasks without human operators is a form of automation. When AI is added, the robots might adapt to changes or fix errors on their own.
- **Backpropagation:** This is a key algorithm used to train Neural Networks. Imagine a student taking a test: they get some answers wrong. Backpropagation is like figuring out *which* internal "connections" (weights) in the network were responsible for those errors and then adjusting them slightly so the network performs better next time. It helps the network learn by reducing errors.
 - Example: If a network incorrectly identifies a cat as a dog, backpropagation adjusts its internal settings so it's more likely to get it right next time it sees a cat.
- **Bias (in AI):** This occurs when an AI system shows a systematic error or unfair prejudice in its output. It often happens because the Training Data used to teach the AI contained stereotypes, skewed information, or was not representative of the real world. This can lead to discriminatory or unfair results.
 - Example: An AI hiring tool that favors male candidates over equally qualified female candidates because it was trained on historical hiring data that reflected gender bias.
- **Big Data:** Refers to extremely large and complex collections of data that are too big for traditional data processing tools. Analyzing Big Data often reveals hidden patterns, trends, and associations, which are crucial for training advanced AI and Machine Learning models.

- Example: The vast amount of data generated by social media platforms, online transactions, or sensor networks in a smart city.
- **Chatbot:** An AI program designed to mimic human conversation, either through text (like on a website) or voice (like a phone assistant). They are used to answer questions, provide information, or perform simple tasks.
 - Example: The automated chat window that pops up on a customer service website asking, "How can I help you today?"
- **Classification:** A common task in Machine Learning where the AI learns to sort data into predefined categories or "classes." It's like putting things into labeled boxes.
 - Example: An AI that looks at an email and decides if it belongs in the "spam" box or the "inbox" is performing a classification task.
- **Clustering:** An Unsupervised Learning technique where the AI finds natural groupings or "clusters" within a Data Set that doesn't have predefined labels. It groups similar things together without being told what those groups should be.
 - Example: Grouping customers based on their purchasing habits without knowing beforehand what types of customer groups exist.
- **Cognitive Computing:** A subset of AI that aims to create systems that can mimic human thought processes, including reasoning, understanding, and learning. These systems often use Natural Language Processing, Data Mining, and pattern recognition to interact with humans more naturally.
 - Example: IBM's Watson, which could understand questions asked in natural language and answer them by analyzing vast amounts of data, is a form of cognitive computing.
- **Computer Vision:** This is a field of AI that allows computers to "see," interpret, and understand visual information from images or videos, much like human eyes and brains do. This enables machines to recognize objects, people, and scenes.
 - Example: Facial recognition systems on your phone, self-driving cars detecting traffic signs, or medical AI analyzing X-ray images.
- **Convolutional Neural Network (CNN):** A specialized type of Neural Network that is particularly good at processing images. CNNs can automatically learn to recognize patterns and features within an image, like edges, shapes, and textures, which makes them highly effective for tasks like image recognition and classification.
 - Example: The AI that identifies objects in your photos (e.g., "This photo has a dog") likely uses a CNN.

- **Data Mining:** The process of discovering useful patterns, insights, and hidden knowledge from large Data Sets. It often uses Machine Learning algorithms, statistics, and database systems.
 - Example: A retail company using data mining to find out which products are often bought together by customers.
- **Data Set:** A collection of related pieces of information (data) used to train, validate, or test an AI or Machine Learning model.
 - Example: A collection of thousands of pictures of cats and dogs, each labeled correctly, used to train an image recognition AI.
- **Deep Learning:** A powerful subfield of Machine Learning that uses Neural Networks with many layers (hence "deep"). These "deep" networks can learn extremely complex patterns directly from raw data, leading to breakthroughs in areas like image and speech recognition.
 - Example: The technology behind voice assistants that understand your spoken commands, or systems that can translate languages in real time.
- **Explainable AI (XAI):** Refers to techniques that make the decisions and predictions of AI systems understandable to humans. Because complex AI models can sometimes act like "black boxes," XAI aims to provide transparency and insight into their reasoning. This is crucial for building trust, accountability, and safety.
 - Example: An XAI system might not just tell a doctor "this patient has disease X," but also "the AI concluded disease X due to the following three symptoms and two lab results."
- **Feature Engineering:** The process of selecting relevant data, transforming it, and sometimes creating new input variables (features) from raw data to improve the performance and accuracy of Machine Learning models. It's about helping the model see the most important information.
 - Example: If you're predicting house prices, instead of just using "number of bedrooms," you might create a new feature like "bedrooms per square foot" to give the model better insight.
- **Generative AI:** A type of AI that can create new, original content, rather than just analyzing existing data. This content can include text, images, audio, or video, and it's generated to be similar in style or characteristics to the data it was trained on.
 - Example: AI that can write a short story, compose a song, or create realistic images from a text description.

- **Gradient Descent:** A fundamental optimization Algorithm used in Machine Learning, especially for Neural Networks. It's like descending a mountain in the fog – you take small steps in the steepest downward direction to eventually reach the lowest point (which represents the best performance for your model).
 - Example: How a Deep Learning model finds the best settings (weights) to minimize its errors during Training.
- **Inference:** The process where a trained AI or Machine Learning model uses its learned knowledge to make predictions or decisions on new, previously unseen data. It's the "applying" stage after training.
 - Example: After an AI is trained to recognize cats, showing it a new picture of a cat and having it correctly identify it is an inference step.
- **Large Language Model (LLM):** A specific type of Deep Learning model that has been trained on an immense amount of text and code data. LLMs are exceptionally good at understanding, generating, and processing human language, making them a cornerstone of many Generative AI applications.
 - Example: ChatGPT or Google's Gemini are well-known examples of Large Language Models.
- **Machine Learning (ML):** A core subfield of AI that allows computers to "learn" from data without being explicitly programmed for every task. ML algorithms identify patterns and make predictions or decisions based on the data they've processed.
 - Example: Recommendation systems on streaming services (like Netflix suggesting movies you might like) are powered by machine learning.
- **Natural Language Processing (NLP):** An AI field focused on enabling computers to understand, interpret, and generate human language in a way that is meaningful and useful. It bridges the gap between how humans communicate and how computers process information.
 - Example: Spam filters that detect unwanted emails, language translation tools, or sentiment analysis that tells if a customer review is positive or negative.
- **Neural Network:** A computational model inspired by the structure and function of the human brain's interconnected neurons. It consists of layers of "nodes" (like artificial neurons) that process information and learn from patterns in data. They are the building blocks of Deep Learning.
 - Example: Imagine a series of interconnected filters, each learning to recognize a different aspect of the data (like edges in an image, then shapes, then full objects).

- **Overfitting:** A problem in Machine Learning where a model learns the Training Data too well, including its noise and random fluctuations, rather than the underlying patterns. This leads to the model performing very well on the data it was trained on but poorly on new, unseen data.
 - Example: A student who memorizes answers for a test without understanding the concepts might do well on that specific test, but fail a different one on the same subject.
- **Predictive Analytics:** The use of Data Mining, Machine Learning, and statistical Algorithms to forecast future outcomes or trends based on historical data. It's about using past information to predict the future.
 - Example: A bank using predictive analytics to assess the likelihood of a customer defaulting on a loan, or a company predicting future sales based on past trends.
- **Prompt Engineering:** The art and science of crafting effective instructions or questions (prompts) for Generative AI models, especially Large Language Models (LLMs). The quality of the prompt directly influences the quality and relevance of the AI's output.
 - Example: Knowing how to write a prompt like "Write a concise, positive email to a client about a project update" instead of just "Write an email."
- **Reinforcement Learning:** A type of Machine Learning where an AI agent learns to make decisions by performing actions in an environment to maximize a cumulative reward. It learns through trial and error, like training a pet with treats.
 - Example: An AI learning to play chess by being rewarded for winning moves and penalized for losing ones, eventually figuring out the best strategies. This is also how self-driving cars can learn to navigate complex environments.
- **Regression:** A Supervised Learning task where the AI predicts a continuous numerical output value, rather than a category.
 - Example: Predicting the price of a house based on its size, location, and number of bedrooms, or forecasting temperature.
- **Robot:** A machine designed to carry out a complex series of actions automatically. While robots can perform tasks without AI, modern robots often incorporate AI for perception, decision-making, learning from their environment, and more advanced autonomy.
 - Example: Industrial robots on an assembly line, or sophisticated humanoid robots that can walk, talk, and interact.

- **Supervised Learning:** A type of Machine Learning where the model learns from a labeled Data Set. This means each piece of Training Data is accompanied by the correct answer or output. The model learns to map inputs to correct outputs.
 - Example: Teaching a child to identify animals by showing them pictures labeled "cat," "dog," "bird." The AI learns similarly from labeled examples.
- **Tensor:** A fundamental data structure in Deep Learning. Think of it as a multi-dimensional container for numbers. A single number is a 0D tensor (scalar), a list of numbers is a 1D tensor (vector), a table of numbers is a 2D tensor (matrix), and so on. They are how data (like images or text) is represented for Neural Networks.
 - Example: A grayscale image can be represented as a 2D tensor (a grid of pixel intensities). A color image would be a 3D tensor (height x width x color channels).
- **Training Data:** The portion of a Data Set that is used to teach a Machine Learning model. The model analyzes this data to learn patterns, relationships, and rules.
 - Example: All the pictures of cats and dogs an AI is shown *before* it's asked to identify a new animal.
- **Transfer Learning:** A Machine Learning technique where a model that has already been trained for one task is reused as a starting point, or "fine-tuned," for a different but related task. This saves a lot of Training time and can achieve good performance with less new data.
 - Example: Taking an AI model already trained to recognize general objects (like cars, trees, people) and then fine-tuning it to specifically identify different types of birds.
- **Unsupervised Learning:** A type of Machine Learning that works with unlabeled Data. Instead of being given correct answers, the algorithm must find patterns, structures, or relationships within the data on its own.
 - Example: Grouping customers into distinct segments based on their purchasing behavior without being told what those segments are beforehand.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the term for a subset of AI that enables systems to learn and make decisions from data without being explicitly programmed?

- a) Predictive Analytics
- b) Machine Learning**
- c) Automation
- d) Generative AI

Question 2

Which AI approach involves creating new content by learning patterns from existing data, often used in text, image, and music generation?

- a) Automation
- b) Machine Intelligence
- c) Generative AI**
- d) Supervised Learning

Question 3

What does "predictive analytics" primarily involve in the context of AI?

- a) Using data to make predictions about future events or outcomes**
- b) Programming machines with predefined instructions
- c) Creating autonomous systems that require minimal human input
- d) Building physical robots capable of human-like movements

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Coursera. Artificial Intelligence Terms: A to Z Glossary. https://www.coursera.org/resources/ai-terms?utm_medium=sem&utm_source=gg&utm_campaign=B2C_EMEA__coursera_FTCOF_career-academy_pmax-multiple-audiences-country-multi&campaignid=20858198824&adgroupid=&device=c&keyword=&matchtype=&network=x&devicemodel=&adposition=&creativeid=&hide_mobile_promo&gad_source=1&gclid=Cj0KCQjwo8S3BhDeARIsAFRmkOOEQ15y9_fXwnzpnk2MliTrsqDvRFt0s3xuCmdAFM2Lokcf2hgAIU4aApLkEALw_wcB.%C2%BB . Accessed July 30, 2025.
2. Susanna Ray. 10 AI terms everyone should know. <https://news.microsoft.com/10-ai-terms/>. Accessed July 30, 2025.
3. Casepoint. AI-related terms. <https://www.casepoint.com/blog/ai-related-terms-automation-machine-learning/>
4. Casepoint. AI vs. Automation vs. Machine Learning: AI Terms You Should Know. <https://www.casepoint.com/blog/ai-related-terms-automation-machine-learning/>. Accessed July 30, 2025.

Lesson 3

Understanding different AI types

Expected reading time: 18 minutes

Main page content

Artificial Intelligence (AI) has become an integral part of modern technology, touching nearly every aspect of our lives, from healthcare to finance, and entertainment to education. As AI continues to grow and evolve, it's increasingly important to understand its various forms, their capabilities, and how they operate.

An introductory video (6:49 minutes), available at <https://www.youtube.com/watch?v=XFZ-rQ8eeR8>, presents seven key categories of AI. These range from the narrow AI we use every day to super AI, a potential future intelligence that could surpass human thought and emotion. Specifically, the video breaks down AI into three types based on capabilities (Artificial Narrow Intelligence, Artificial General Intelligence, Artificial Superintelligence) and four types based on functionalities (Reactive Machine AI, Limited Memory AI, Theory of Mind AI, Self-Aware AI).

This lesson explores the various ways AI is classified, examining both its capabilities, what it's ultimately capable of achieving, and its functionalities.

Understanding AI: Capabilities vs. Functionalities

When we discuss Artificial Intelligence, we usually classify it in two main ways: by its capabilities and by its functionalities. While they might sound similar, they describe different aspects of AI.

AI classified by capabilities describes the level of intelligence an AI system can potentially reach. It's about how smart or adaptable an AI is. This perspective helps us imagine the future of AI, from the basic systems we have now to highly advanced, theoretical forms that might one day match or even exceed human intelligence. It looks at the potential of AI. When considering AI capabilities, SEOs can leverage today's Artificial Narrow Intelligence (ANI) for practical, data-driven tasks. This means using AI to sift through vast amounts of data to find

the best keywords, analyze competitor strategies, predict content performance, and automate routine SEO audits.

AI classified by functionalities, on the other hand, focuses on how an AI system actually works and its operational characteristics. This classification examines the underlying mechanisms behind an AI's behavior, such as whether it can simply react to input, remember past events, understand human emotions, or even have a sense of self. This perspective helps us understand the current workings and the developmental path of AI. Regarding AI functionalities, SEOs benefit from different operational strengths. Reactive Machines provide simple automation, like monitoring website uptime or flagging basic errors. Limited Memory AI is particularly valuable, enabling tools to learn from historical data to refine keyword targeting, personalize content suggestions based on past user behavior, and improve overall content strategies.

Let's now deep dive into these different aspects of AI:

Types of AI Based on Capabilities

AI types based on capabilities are classified by their intelligence and learning potential.

1. Artificial Narrow Intelligence (ANI)

Artificial Narrow Intelligence (ANI), often called Weak AI, refers to AI systems built to perform a single, specific task within a defined area. These systems are highly skilled at their designated function but cannot apply their knowledge to new, unrelated tasks. They operate by processing large amounts of information to deliver smart outputs without truly understanding what they're doing or being conscious. For example, virtual assistants like Siri or Google Assistant are excellent at understanding voice commands to play music or answer quick questions. Similarly, search engines use ANI to quickly sort through billions of web pages to find the most relevant results for your query.

2. Artificial General Intelligence (AGI)

Artificial General Intelligence (AGI), also known as Strong AI, is a theoretical type of AI that would possess intelligence comparable to a human being. This means an AGI system could understand, learn, and apply knowledge across many different areas, just like a person can. Unlike ANI, AGI would be able to learn from experiences and adapt its skills to new, unfamiliar situations without needing specific new programming. While still a concept, an AGI system might someday function as an advanced research assistant, capable of independently designing scientific experiments, analyzing results, and forming new hypotheses across various fields of study.

3. Artificial Superintelligence (ASI)

Artificial Superintelligence (ASI) is a highly speculative form of AI that would not only match but surpass human intelligence in every way. This includes cognitive abilities, creativity, emotional understanding, and problem-solving skills. An ASI would be able to think, reason, learn, and make decisions far better and faster than any human. It might even develop its own consciousness, emotions, needs, and beliefs. For instance, an ASI could potentially act as a global problem solver, devising incredibly complex and innovative solutions to worldwide challenges like climate change or pandemics that are far beyond human capability.



ChatGPT is an excellent illustration of Artificial Narrow Intelligence (ANI), a form of AI that, while specialized, achieves impressive levels of performance. This advanced large language model is trained on a vast amount of text and code from the internet. Its core capability lies in understanding and generating natural language in an exceptionally fluid and contextual manner, enabling it to answer complex questions, write creative texts, summarize long documents, or even generate programming code. ChatGPT's impact is profound and transformative: it has democratized content creation, making it accessible for a wide audience to generate high-quality text rapidly.

Businesses and professionals can automate the drafting of emails, blog posts, marketing materials, and more, freeing up valuable human time for higher-level strategy and creativity. This acceleration in production and efficiency in information management is actively reshaping industries, showcasing the powerful potential of ANI when focused on specific yet complex tasks.

Types of AI Based on Functionalities

AI types based on functionalities are classified by how they operate and their ability to learn and change over time.

1. Reactive Machines

Reactive Machines are the most basic form of AI. They are designed to simply react to current situations with predefined responses. These systems don't have memory, meaning they can't learn from past experiences or use them to influence future decisions. They only process the information available to them at that exact moment. A

classic example is IBM's Deep Blue, the chess computer that beat Garry Kasparov; it analyzed the board and made moves based only on the current position, not remembering previous games. Another common example is a basic spam filter, which identifies unwanted emails by applying a set of fixed rules to the incoming messages.

2. Limited Memory AI

Limited Memory AI represents a significant step up, as it can use past data to learn and improve its performance over time. Unlike reactive machines, these systems can hold onto information temporarily to help them make better decisions in the near future. This type of AI is very common today, thanks to advancements in deep learning. For example, self-driving cars use limited memory AI to observe their surroundings, like the speed and direction of other cars, and make driving decisions based on this recent information. Similarly, generative AI tools like ChatGPT or Bard learn from vast amounts of text data to understand context and generate coherent responses based on previous parts of a conversation.

3. Theory of Mind AI

Theory of Mind AI refers to theoretical AI systems that could understand and interpret human emotions, beliefs, intentions, and mental states. This goes beyond just reacting to what a person says: it would involve genuinely inferring their feelings and motivations, much like humans do. This type of AI is still mostly a concept and has not been fully achieved. While not possessing true emotional understanding, early efforts like the robot Kismet, developed at MIT, were designed to recognize and respond to human emotions through facial expressions and vocal tones, mimicking empathetic interactions.

4. Self-Aware AI

Self-Aware AI represents the most advanced and purely theoretical type of artificial intelligence. It suggests a system that would possess consciousness and self-awareness, similar to humans. This means the AI would understand its own existence, its internal states, its traits, and could even have its own emotions, needs, and beliefs. Currently, the technology needed to create self-aware AI has not been developed. Hypothetically, an advanced humanoid robot equipped with self-aware AI might be able to not just process information, but also reflect on its own experiences and make independent decisions based on a deep understanding of itself.

NETFLIX

Netflix's renowned recommendation system is a clear example of Limited Memory AI. This type of AI stands out for its ability to use historical data to learn and improve its performance over time. It doesn't just react to your latest click; it stores a significant history of your interactions, such as what movies or series you've watched, for how long, what you've added to your list, or what you've rated positively or negatively. By leveraging this effective, albeit "limited," memory, the system analyzes your tastes and compares them with those of millions of other users, predicting with high accuracy which new titles you might enjoy.

The impact of this system is enormous: for users, it translates into a highly personalized entertainment experience, reducing time spent searching and significantly boosting satisfaction. For Netflix, it means greater subscriber engagement, as users stay on the platform longer and are less likely to cancel, demonstrating how an AI that learns from the recent past can drive commercial success and customer loyalty.

Conclusion

These examples highlight the wide range of Artificial Intelligence types, each designed to meet different needs and coming with its own applications, limitations, and ethical considerations. From task-specific systems to the theoretical realms of general intelligence and superintelligence, AI continues to evolve, constantly creating new opportunities and challenges.

By understanding these various types, we gain valuable insight into how AI is built, how it operates, and where it might lead us in the future.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which type of AI is currently the only one in existence and is designed for specific tasks?

Artificial General Intelligence (AGI)

Artificial Narrow Intelligence (ANI)

Artificial Superintelligence (ASI)

Self-Aware AI

Question 2

What is a key characteristic of Limited Memory AI, as exemplified by Netflix's recommendation system?

It lacks any form of memory and reacts only to immediate input.

It possesses full human-level consciousness and emotions.

It uses historical data for a temporary period to improve future actions.

It is purely theoretical and has no real-world applications yet.

Question 3

Which of the following best describes the difference between AI based on "Capabilities" and AI based on "Functionalities"?

Capabilities refer to how AI looks, while functionalities refer to how it sounds.

Capabilities describe the AI's potential level of intelligence, while functionalities describe its operational mechanisms and how it works.

Capabilities are for theoretical AI, while functionalities are only for existing AI.

Capabilities focus on ethical considerations, while functionalities focus on data privacy.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Insight into the four main types of AI: <https://bernardmarr.com/what-are-the-four-types-of-ai/> Accessed July 30, 2025
2. IBM's perspective on AI classifications and functionalities: <https://www.ibm.com/think/topics/artificial-intelligence-types> Accessed July 30, 2025
3. Eaton Business School. 7 types of AI (artificial intelligence) you must know. <https://ebsedu.org/blog/7-types-of-artificial-intelligence>. Accessed July 30, 2025
4. Forbes, Naveen Joshi. 7 Types of Artificial Intelligence. <https://www.forbes.com/sites/cognitiveworld/2019/06/19/7-types-of-artificial-intelligence/>. Accessed July 30, 2025

Lesson 4

Responsible AI and ethics

Expected reading time: 18 minutes

Main page content

Artificial Intelligence (AI) has rapidly become a game-changer across nearly all industries, fundamentally reshaping how we work, communicate, and innovate. However, with such immense power comes significant responsibility. As AI systems increasingly influence our daily lives, prioritizing ethical considerations is crucial. This ensures that AI's deployment genuinely benefits society, respects human rights, and actively prevents harm.

This training material delves into the core ethical issues in AI, offering insights to navigate these challenges and foster the responsible use of AI. To start, we recommend watching this video (6:49 minutes), available at <https://www.youtube.com/watch?v=6yDr7CWLJ8c>, who explores AI ethics, also known as ethical AI or responsible AI. It emphasizes the critical importance of adhering to established Codes of Ethics for AI, which address key concerns such as accountability, trust, transparency, fairness, and human agency.

The video also introduces an overarching ethical framework, developed by philosopher Luciano Floridi from various codes, that highlights five foundational principles:

- *beneficence* (AI should improve well-being),
- *non-maleficence* (AI must "do no harm"),
- *autonomy* (preserving human freedom),
- *justice* (promoting fairness and equity),
- *explicability* (understanding how AI makes decisions to ensure accountability)

By exploring these principles and their practical applications, you'll be better equipped to avoid potential biases, uphold data privacy standards, and ensure the proper, ethical deployment of AI technology.

Ethical AI isn't just about preventing harm; it's about advocating for "AI for social good," pushing developers to use AI to advance societal welfare.

Responsible AI: technologies trajectories for SEOs

Responsible AI represents a crucial and evolving paradigm ensuring that Artificial Intelligence systems are developed, deployed, and used in a manner that is fundamentally ethical, fair, transparent, and accountable. It extends beyond mere compliance with regulations, advocating for a proactive approach where ethical considerations are deeply embedded throughout the entire AI lifecycle, from the initial concept and design to its real-world implementation and continuous monitoring.

This framework helps organizations, particularly social enterprises, to leverage AI not only to amplify their positive societal impact but also to proactively identify and mitigate potential risks, especially those affecting vulnerable populations, while steadfastly upholding public trust.

Responsible AI calls for a systematic approach that considers the broader societal implications of AI technologies, ensuring they align with human values and contribute to a just and sustainable future. The following four ethical principles, deeply rooted in fundamental human rights, are essential for ensuring the trustworthy development, deployment, and use of AI systems in this sensitive sector:

- **Respect for human autonomy:** AI systems must be designed to respect and empower individuals, allowing them to make informed decisions without any form of manipulation or coercion. This means ensuring that people remain in control of their choices and that AI tools enhance, rather than diminish, their freedom.
 - For social enterprises, this translates into deploying AI solutions that genuinely enhance the capabilities, dignity, and independence of beneficiaries. Prioritizing autonomy is paramount for building trust and fostering equitable relationships with all stakeholders, from beneficiaries to donors and employees.
- **Prevention of harm:** AI systems must rigorously avoid causing harm or worsening existing societal problems that negatively affect human well-being. This principle broadly covers safeguarding human dignity, as well as physical and mental integrity. It demands that both the AI systems themselves and the environments in which they operate prioritize safety, security, and the avoidance of unintended negative consequences.
 - Social enterprises, with their mission to do good, bear the crucial responsibility of ensuring that AI systems do not inadvertently harm vulnerable populations, perpetuate discrimination, or compromise the hard-earned trust placed in them.

- **Fairness** : The development, deployment, and use of AI systems must consistently uphold the principle of fairness. This principle ensures that AI systems operate equitably for all individuals and groups, actively addressing and mitigating biases, whether those biases are inherent in the data, introduced during development, or emerge during deployment. It also necessitates fostering genuine inclusivity, ensuring that AI benefits everyone and does not create new forms of discrimination or exclusion. This principle aligns perfectly with the core goals of social enterprises, which are inherently committed to reducing inequality and promoting justice.
- **Explicability** : this principle highlights the importance of transparency in AI systems, guaranteeing that all stakeholders, from end-users to regulators, can understand how and why certain decisions or outcomes are reached by an AI. This principle involves making AI processes comprehensible, allowing for traceability of decisions, and providing clear explanations when required.
 - This is critical for building and maintaining trust with beneficiaries, donors, and regulatory bodies, particularly in sensitive social contexts. Explicability not only fosters trust but also underpins accountability, ensuring that AI tools are used responsibly, are auditable, and their impact can be properly assessed within the complex and sensitive social business environment.



The PRISM framework is a practical guide developed by the World Economic Forum to help organizations, especially those focused on social impact, implement responsible AI.

PRISM is an acronym that stands for *Partnership, Responsible Design, Inclusivity, Sustainability, and Measurability*. It offers a structured approach to integrate ethical considerations from the outset of an AI project through to its implementation and evaluation, specifically in the context of social innovation.

This framework moves beyond abstract ethical principles to provide actionable steps for organizations leveraging AI for social good. By focusing on Partnership, it encourages deep collaboration with affected communities, ensuring solutions are truly needs-driven:

- Through Responsible Design, it emphasizes embedding ethical considerations and risk mitigation from the ground up.
- Inclusivity ensures that AI benefits all members of society, particularly vulnerable groups.

- Sustainability ensures long-term positive impact and considers environmental implications.
- Finally, Measurability provides a crucial way to track and verify the ethical outcomes and effectiveness of AI solutions.

PRISM thereby helps organizations build trust, ensure equity, and truly maximize the positive societal impact of their AI solutions, making responsible AI a tangible reality for social innovators.

EU Recommendations for Trustworthy AI

To govern AI, the aforementioned principles must be translated into concrete requirements.

The European Union has taken a leading global role in establishing a robust ethical framework for Artificial Intelligence, aiming to foster innovation while ensuring human-centric and trustworthy AI. Through its High-Level Expert Group on AI (AI HLEG) and subsequent legislative proposals like the AI Act, the EU has developed comprehensive guidelines and requirements. These initiatives emphasize that AI systems developed and used within the EU must be lawful, ethical, and robust to build public trust and societal acceptance.

The EU's framework for Trustworthy AI is built upon seven key ethical requirements that AI systems should fulfill throughout their entire lifecycle, from design to deployment and beyond. These requirements are not merely technical specifications but reflect fundamental rights and values:

1. **Human Agency and Oversight:** This principle asserts that AI systems should empower human beings, not diminish their autonomy. It requires that AI systems support human decision-making and that there are effective mechanisms for human oversight and intervention, ensuring that humans remain in control and can override AI decisions if necessary.
2. **Technical Robustness and Safety:** AI systems must be resilient to attacks, errors, and malicious use. They need to be reliable, accurate in their predictions, and secure, preventing unintended harm or system failures. This includes considering reliability, accuracy, resilience, and general security.
3. **Privacy and Data Governance:** Given AI's reliance on data, robust privacy protection and excellent data governance practices are paramount. This means ensuring that personal data used by AI is collected, stored, processed, and managed in full compliance with data protection laws (like GDPR) and ethical standards, safeguarding individual rights.

4. **Transparency:** The processes, capabilities, and purpose of AI systems should be made clear, and their decisions should be understandable and traceable. This involves ensuring that stakeholders can comprehend how AI systems reach their conclusions, facilitating auditability, and allowing for clear communication about the AI's functions and limitations.
5. **Diversity, Non-discrimination, and Fairness:** AI systems must be developed and used to ensure fair outcomes for all individuals and groups, actively working to prevent and mitigate biases. This requires addressing biases in data, algorithms, and deployment, and fostering inclusivity, ensuring AI does not create or perpetuate discrimination based on gender, race, disability, or other characteristics.
6. **Societal and Environmental Well-being:** AI should be designed and deployed with a view to benefiting society and the environment as a whole. This broad requirement encourages considering AI's impact on sustainability, democracy, social cohesion, labor conditions, and ensuring it contributes positively to global challenges.
7. **Accountability:** Clear mechanisms must be in place to ensure responsibility for AI systems and their outcomes. This includes processes for auditability, impact assessments, mechanisms for redress (e.g., if a person is harmed by an AI decision), and holding developers and deployers accountable for the ethical performance of their AI systems.

These comprehensive recommendations are designed to serve as a practical blueprint, guiding developers, deployers, and users of AI across Europe and globally to build trust in AI and foster responsible innovation that aligns with democratic values and fundamental rights.

Verification of the participant's understanding

Format: **Scenario Simulation**

Background

GreenGrowth is a social enterprise focused on promoting sustainability through urban gardening initiatives. To enhance community engagement, the organization decided to develop an AI-powered platform called *GrowTogether*, designed to match users with community gardening opportunities based on their preferences, location, and availability. The platform uses machine learning to analyze user data and provide personalized recommendations. While the initiative aimed to increase participation and foster environmental consciousness, ethical concerns arose regarding data collection, bias, and the platform's transparency.

As a manager of a social enterprise, you need to address these issues to ensure the platform aligned with your mission of social equity and sustainability.

Challenges encountered:

1. **Privacy and data security:** To personalize recommendations, the platform collected sensitive information, including users' locations, schedules, and gardening preferences. While this data was essential for the platform's functionality, concerns emerged about how it was stored and whether it could be accessed or misused.

Key question: How can GreenGrowth ensure user data is protected while maintaining platform functionality?

Select the behavior you believe best addresses the ethical considerations for GreenGrowth:

- a. Store all user data on a centralized server without encryption to ensure quick access and processing.
- b. Implement robust encryption and anonymization techniques for user data, complying with privacy regulations like GDPR.
- c. Use user data freely for all organizational activities without seeking explicit consent to streamline operations.

2. **Bias in recommendations:** The machine learning algorithm used for *GrowTogether* inadvertently favored users from urban areas with higher internet connectivity and excluded those from underserved communities. This bias contradicted the organization's goal of inclusiveness and equal access.

Key question: How can the platform's algorithm be adjusted to ensure fairness and inclusiveness?

Select the behavior you believe best addresses the ethical considerations for GreenGrowth:

- a. Audit the existing dataset for bias, incorporate additional data from underserved communities, and implement fairness constraints in the algorithm.

- b. Allow the algorithm to operate as is, assuming that biases will naturally balance out over time with more user data.
 - c. Use only data from urban users, citing ease of access and better data quality, even if it excludes other groups.
3. **Transparency and explainability:** Users began questioning how GrowTogether made its recommendations. Some suspected favoritism or hidden agendas, undermining trust in the platform.
- Key question: How can GreenGrowth make the decision-making process of its AI platform more transparent and understandable to users?
- Select the behavior you believe best addresses the ethical considerations for GreenGrowth:*
- a. Avoid providing detailed explanations of the system's decisions, as it might confuse users and reduce their trust.
 - b. Introduce an explainable AI (XAI) feature, provide user-friendly guides, and organize webinars to explain how the platform works.
 - c. Share only technical documents about the algorithm's operations, assuming that users interested in the details will figure it out.
4. **Accountability:** A technical glitch resulted in a group of users being matched with inaccessible or overcrowded gardening sites, leading to dissatisfaction and complaints. The situation raised questions about accountability for errors made by AI systems.
- Key question: Who should be held accountable for mistakes caused by the AI system, and how should they be addressed?
- Select the behavior you believe best addresses the ethical considerations for GreenGrowth:*
- a. Blame technical glitches on external factors or the users themselves and avoid addressing systemic issues.
 - b. Disband the AI team and rely solely on external vendors for accountability, removing the organization's responsibility for errors.
 - c. Establish a dedicated team to monitor the platform, respond to issues promptly, and implement a feedback loop for continuous improvement.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. European Commission, AI HLEG. Ethics Guidelines for Trustworthy AI. <https://op.europa.eu/en/publication-detail/-/publication/d3988569-0434-11ea-8c1f-01aa75ed71a1>. Accessed July 25, 2025
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AI as an enabler in SEOs' decision-making

The module includes the following lessons:

5. *Ensuring Privacy in the age of AI*
6. *Overcoming biases thanks to the responsible use of AI*
7. *Reduce AI and Digital Carbon Footprint*
8. *Over-reliance on AI*
9. *Navigate Intellectual Property in Generative AI*

Lesson 5

Over-reliance on AI

Expected reading time: 17 minutes

Main page content

In an era defined by unprecedented technological advancement, Artificial Intelligence (AI) stands at the forefront, reshaping industries, economies, and societies at an astonishing pace. From automating complex processes to enhancing decision-making with data-driven insights, AI promises a future of increased efficiency, innovation, and problem-solving capabilities previously unimaginable. Its pervasive integration into our daily lives and professional spheres offers a wide range of benefits, promising to unlock new levels of productivity and transform how we interact with the world.

For a visual perspective on AI's impact on careers and jobs, including how it affects different types of tasks, we recommend watching "The Impact of AI on Careers and Jobs" by Rutika Muchhala at https://www.youtube.com/watch?v=_U2YobRC8OY&ab_channel=TEDxTalks

However, this rapid adoption and growing dependence on AI are not without their complexities. As AI systems become more sophisticated and autonomous, they introduce a unique set of challenges that demand careful consideration and proactive management. Among these, the issues of data privacy, cybersecurity, algorithmic bias, and the very nature of human-AI collaboration emerge as critical concerns. This lesson delves into the multifaceted impact of AI on the workforce, exploring the inherent challenges of an excessive reliance on these technologies. We will pay particular attention to the intricate relationship between AI, personal data, and security, examining how these elements intersect to create both opportunities and risks. Finally, we will discuss practical and ethical strategies for mitigating adverse effects, ensuring that the integration of AI leads to equitable, secure, and sustainable outcomes for all, with a specific focus on the vital role of Social Economy Organizations (SEOs) in this evolving landscape.

Challenges of Over-Reliance on AI

AI has revolutionized the way businesses operate by automating repetitive tasks, analyzing vast amounts of data, and enabling innovations in fields like healthcare, finance, manufacturing, and retail. Tasks that once required significant human effort, such as customer support, logistics planning, or quality assurance, can now be performed faster

and more accurately by AI systems. For instance, AI-powered chatbots handle millions of customer queries daily, streamlining communication and freeing up human agents for more complex issues. Machine learning algorithms optimize complex supply chains, predicting demand fluctuations and reducing waste. In healthcare, AI assists in diagnosing diseases by analyzing medical images with remarkable accuracy, sometimes surpassing traditional methods. AI's capacity to process and derive insights from Big Data has opened doors for unprecedented efficiency and predictive capabilities across sectors, allowing organizations to operate smarter and faster. While these advancements bring undeniable benefits, they also introduce new challenges, particularly in terms of workforce dynamics and the responsible handling of sensitive information.

The increasing dependence on AI systems, while beneficial, introduces several critical challenges, with data privacy and cybersecurity being paramount:

1. **Skill Gaps and Workforce Displacement:** The rapid evolution of AI creates a demand for highly specialized skills, such as programming, data analysis, AI system design, and prompt engineering. Unfortunately, many current workers lack access to the necessary training to transition into these new roles, leading to a growing skills gap. This can exacerbate inequality, leaving certain segments of the workforce unprepared for an AI-driven economy.
2. **Over-Dependence on AI Decisions:** Relying too heavily on AI for decision-making can lead to a situation where human judgment is sidelined or diminished. In critical areas like hiring, lending, or even allocation of public resources, AI models may produce biased or flawed outcomes if not properly monitored. The "black box" nature of some advanced AI systems, where their internal reasoning is opaque, makes it difficult to understand why a particular decision was made, potentially leading to unfair or harmful consequences without clear human oversight.
3. **Loss of Human Creativity, Intuition, and Critical Thinking:** If AI-generated solutions become the norm across sectors like marketing, design, or strategic planning, it can inadvertently stifle human creativity, critical thinking, and intuition. Excessive reliance on AI might limit the unique problem-solving approaches, innovative ideas, and empathetic understanding that are distinct human strengths.
4. **Economic Inequality and Access Disparities:** The economic benefits of AI adoption are often concentrated among large corporations and high-skilled workers who possess the significant resources required to invest in and manage these complex technologies. This can widen the gap between well-resourced entities and smaller organizations, or between high-income individuals and those in lower-skilled positions, thereby exacerbating existing economic inequalities.
5. **Ethical, Accountability, and Privacy Issues:** This category encompasses some of the most pressing concerns with AI over-reliance:

- **Accountability:** When decisions are primarily made by AI systems, assigning responsibility becomes incredibly challenging, especially in cases where outcomes are negative, biased, or controversial. A lack of transparency in AI decision-making processes makes it difficult to pinpoint fault, hindering efforts to identify and address errors or biases. A real-world example occurred when a self-driving car, operating with advanced AI, was involved in a fatal pedestrian accident. Determining accountability became complex, involving questions of the AI's programming, the sensor's performance, the human operator's role, and the company's testing protocols. This incident highlighted the urgent need for clear ethical and legal frameworks around AI responsibility.
- **Data Privacy:** AI systems are inherently data-intensive. They often require vast amounts of sensitive personal information for training and inference, which raises significant concerns about data privacy and the potential for misuse or unauthorized access. Organizations must rigorously consider how AI processes, stores, and uses sensitive user data, ensuring strict compliance with evolving privacy regulations like GDPR or CCPA. Protecting personal information and user identity, even within de-identified datasets, is not just a regulatory requirement but a fundamental baseline for responsible AI. For instance, a widely cited concern is the indiscriminate collection of biometric data (like facial recognition scans) or geolocation data by AI-powered applications, which can create detailed and invasive profiles of individuals without explicit consent, exposing them to risks of surveillance and discrimination. It's essential that data privacy policies are integrated from the design phase (privacy-by-design) to minimize data collection and maximize its protection.
- **Cybersecurity Risks:** As AI systems become more deeply integrated into critical infrastructures and organizational workflows, they also become attractive and potentially vulnerable targets for cyberattacks. The data pipelines that feed AI models, the models themselves, and their outputs can be manipulated. Attackers might exploit vulnerabilities in AI algorithms (e.g., through adversarial attacks that trick the AI) or gain unauthorized access to the massive datasets they process. Ensuring the cybersecurity of AI systems is paramount to prevent data breaches, malicious manipulation, or the disruption of essential services. This includes measures like robust encryption, stringent access controls, and continuous monitoring for anomalies within the AI's operations and data flows. For example, a successful attack on an AI system managing a city's smart grid could lead to widespread power outages.

COMPAS

COMPAS (Correctional Offender Management Profiling for Alternative Sanctions) system is an algorithm widely used in the United States to assist judges in assessing a defendant's risk of recidivism and informing bail and sentencing decisions. Developed by Northpointe (now Equivant), this tool has been employed in various states to produce risk scores intended to predict the likelihood of an individual committing a future crime.

However, an in-depth investigation conducted by ProPublica in 2016 uncovered significant algorithmic bias within the system. Their analysis demonstrated that the algorithm was more prone to incorrectly classify Black defendants as high-risk future criminals compared to white defendants. Conversely, white defendants who later re-offended were mistakenly labeled as low-risk more often than their Black counterparts.

This case raised enormous ethical and justice concerns, as the AI's decisions were directly influencing people's freedom and future, perpetuating and amplifying pre-existing racial inequalities within the judicial system. It highlighted the danger of over-reliance on AI without careful verification of the bias in its training data and its outputs.

Strategies for Mitigating the Challenges

Addressing the challenges of over-reliance on AI requires a multi-faceted approach involving technology, policy, and human development, with a strong emphasis on responsible data practices:

1. **Reskilling and Upskilling the Workforce:** Governments, organizations, and educational institutions must collaborate to provide accessible and relevant training programs that equip workers with skills for the AI era. This includes offering courses in AI literacy, coding, data analysis, prompt engineering, and ethical AI principles to help workers transition into new roles or augment their existing ones.
2. **Creating New Job Opportunities by Fostering Human-AI Collaboration:** As AI automates routine tasks, it also creates new opportunities in areas like AI maintenance, ethical AI oversight, data governance, and AI auditing. Encouraging the development of new roles that leverage human creativity, empathy, and judgment (e.g., AI ethicists, data privacy officers, human-in-the-loop reviewers) can help balance job displacement. The goal is to use AI to augment human capabilities rather than replace them entirely, ensuring humans remain involved in critical

decision-making processes, especially those requiring empathy, complex ethical judgment, or nuanced understanding.

3. **Promoting Inclusive AI Development and Ethical Guidelines:** AI systems should be designed with inclusivity in mind, ensuring they benefit a broad range of stakeholders and do not perpetuate or exacerbate existing inequalities. This requires adhering to strict ethical AI development practices, including using diverse training datasets to reduce bias, ensuring transparency in algorithms, and prioritizing fairness. Establishing clear ethical guidelines for AI use, particularly when handling sensitive data, is paramount. This also extends to protecting personal information and safeguarding against potential misuses of AI capabilities.
4. **Robust Regulation and Policy Frameworks for Privacy and Security:** Policymakers play a vital role in addressing the challenges of over-reliance on AI, especially concerning data privacy and cybersecurity. Implementing comprehensive regulations that protect individuals' data rights (e.g., rights to consent, access, rectification, and erasure), promote fair AI use, and ensure accountability for AI-driven decisions is crucial. Regulations should also encourage strong data anonymisation techniques, robust encryption, and proactive cybersecurity measures to prevent unauthorised access or breaches of sensitive data. Building a baseline of trust requires proactive legal and policy frameworks that adapt to AI's rapid advancements.
5. **Fostering Innovation in Human-Centric Roles:** Encouraging innovation in roles that prioritize human creativity, empathy, social intelligence, and complex judgment can help ensure that people remain an essential and valued part of the workforce. Examples include roles in education, counseling, community organizing, advocacy, and the arts, where genuine human interaction and bespoke solutions are irreplaceable.



In 2015 Google Photos faced a significant public relations crisis and an ethical challenge when its AI algorithm mistakenly tagged images of Black individuals as "gorillas." This incident was a stark and highly visible example of algorithmic bias, stemming from insufficient or unrepresentative training data that failed to accurately recognize certain

demographic groups. The immediate public backlash forced Google to confront the issue directly, highlighting the real-world impact of biased AI on user experience and trust.

Google's response serves as a documented effort in AI risk mitigation. Initially, their temporary solution was to simply block the problematic search terms (like "gorilla") from being used to tag photos, preventing the recurrence of the specific misclassification. However, recognizing this was merely a band-aid, the company embarked on a more comprehensive and long-term strategy. This involved investing heavily in improving their AI's training data sets to include a wider, more diverse, and more representative range of images. They also implemented more robust fairness metrics and testing protocols during the AI development lifecycle, ensuring that their image recognition models were continually evaluated for bias across different demographics before deployment.

This iterative process of identifying the bias, taking immediate corrective action, and then implementing systemic improvements in data and testing demonstrates a real-world commitment to mitigating AI risks for a widely used consumer product.

Verification of the participant's understanding

Format: Multiple-choice questions

Question 1

Which of the following is a direct example of algorithmic bias and its impact on justice, as discussed in the lesson?

- a) An AI system that optimizes delivery routes to reduce food waste.
- b) A facial recognition algorithm that mistakenly tags images of Black individuals as "gorillas" due to insufficient training data.
- c) An AI chatbot that handles millions of customer inquiries daily.
- d) An AI system that predicts demand fluctuations for industrial production.

Question 2

One of the primary strategies to mitigate the risks of over-reliance on AI, particularly to address bias and ensure accountability, is:

- a) To completely delegate all decision-making to AI to maximize efficiency.
- b) To use only small, homogeneous training datasets to simplify the model.
- c) To implement a "human-in-the-loop" approach and improve training datasets with greater diversity and representativeness.
- d) To limit access to AI systems only to specialized engineers to reduce costs.

Question 3

For Social Economy Organizations (SEOs) handling sensitive data from vulnerable populations, which of the following represents a critical risk stemming from AI integration if not properly managed?

- a) AI excessively reduces employee creativity within the organization.
- b) AI makes communications with donors too efficient.
- c) A cyberattack on the systems managing the data, leading to a breach of beneficiary privacy.
- d) The need to retrain staff for new AI-driven roles.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. ACLU. "The Pervasive Threat of Face Recognition Technology"
<https://www.aclu.org/issues/privacy-technology/surveillance-technologies/face-recognition-technology> Accessed July 25, 2025
2. Brookings Institution. "What are the cybersecurity risks of AI and machine learning?"
<https://www.brookings.edu/articles/what-are-the-cybersecurity-risks-of-ai-and-machine-learning/> Accessed July 25, 2025
3. Council on Foreign Relations (CFR). "The Cybersecurity Risks of Artificial Intelligence"
<https://www.cfr.org/middle-east-and-north-africa/cybersecurity-risks-artificial-intelligence> Accessed July 25, 2025
4. European Research Council (ERC). "Ethics and AI: tackling biases hidden in big data"
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5. Harvard Business Review (HBR). "The Human Element in AI-Driven Decision Making"
<https://hbr.org/2019/07/the-human-element-in-ai-driven-decision-making> Accessed July 25, 2025
6. Lepide. "AI in Healthcare: Security and Privacy Concerns" <https://www.lepide.com/blog/ai-in-healthcare-security-and-privacy-concerns/> Accessed July 25, 2025
7. ProPublica. "Machine Bias: There's software used across the country to predict future criminals. And it's biased against blacks." <https://www.propublica.org/article/machine-bias-risk-assessments-in-criminal-sentencing> Accessed July 25, 2025
8. The New York Times. "How Data Brokers Sell Our Digital Past — and Futures"
<https://www.nytimes.com/interactive/2024/02/08/technology/data-brokers-personal-information.html> Accessed July 25, 2025
9. The New York Times. "Self-Driving Uber Car Kills Pedestrian in Arizona, Where the Rules of the Road Are Murky" <https://www.nytimes.com/2018/03/19/technology/uber-self-driving-suv-kills-pedestrian.html> Accessed July 25, 2025
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11. The Verge. "Google Photos still tags black people as gorillas, report claims"
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12. The Verge. "Uber's self-driving car killed someone. Now what?"
<https://www.theverge.com/2018/3/20/17141528/uber-self-driving-car-crash-tempe-arizona-fatality-pedestrian-responsibility> Accessed July 25, 2025
13. World Economic Forum. "The Future of Jobs Report 2023"
<https://www.weforum.org/reports/the-future-of-jobs-report-2023/> Accessed July 25, 2025
14. Wired. "Google Photos' 'Gorilla' Gaffe Is a Wake-Up Call for AI"
<https://www.wired.com/2015/07/google-photos-gorilla-gaffe-wake-call-ai/> Accessed July 25, 2025

15. YouTube Video. "The Impact of AI on Careers and Jobs" by Rutika Muchhala
https://www.youtube.com/watch?v=U2YobRC8OY&ab_channel=TEDxTalks Accessed July 25, 2025

Lesson 6

Navigate Intellectual Property in Generative AI

Expected reading time: 17 minutes

Main page content

The rapidly evolving field of AI raises important questions about ownership, protection, and innovation. As AI systems become increasingly capable of generating creative works, inventions, and solutions, traditional IP frameworks face significant challenges in adapting to this new reality. This lesson explores how AI impacts intellectual property, the challenges involved, and the potential opportunities for innovation and legal reform.

For a comprehensive visual overview of the complex relationship between AI and intellectual property, consider watching "AI and Intellectual Property: Who Owns What?" by the World Intellectual Property Organization (WIPO) [https://www.youtube.com/watch?v=bRqwTP2eKJY&ab_channel=BloombergLaw].

The Role of Intellectual Property in Innovation

In the European Union, intellectual property rights (IPRs) are a cornerstone of the single market, crucial for fostering innovation, competition, and economic growth across member states. The EU's approach aims to provide a harmonized framework that allows creators and businesses to protect their innovations effectively throughout the Union. The European Commission defines Intellectual Property Rights as legal rights granted to individuals or entities over their mental creations. These rights typically confer an exclusive right over the use of the creation for a certain period, preventing others from exploiting it without permission. This framework encompasses key types of IP:

- **Patents protect inventions:** granting exclusive rights for technical innovations, such as new products or processes. The European Patent Office (EPO), though distinct from the EU institutions, plays a central role in granting European patents that can then be validated in individual EU member states, offering protection across multiple countries through a streamlined process.

- **Copyrights safeguard literary and artistic works:** including software, music, films, and paintings. Within the EU, copyright protection generally arises automatically upon creation, without the need for registration, and provides rights over reproduction, distribution, and public performance.
- **Trademarks protect brand names, logos, and other signs used to identify goods or services:** distinguishing them from competitors. The European Union Intellectual Property Office (EUIPO) grants EU trademarks (EUTMs), which provide unitary protection across all 27 EU member states with a single registration.
- **Industrial Designs:** protect the appearance of a product (its lines, contours, colors, shape, texture, or materials). The EUIPO also manages Registered Community Designs (RCDs), offering unitary protection across the EU.
- **Geographical Indications (GIs):** protect products that have a specific geographical origin and possess qualities or a reputation due to that origin (e.g., Parmigiano Reggiano, Champagne).

The EU's comprehensive IP framework is designed to balance the interests of creators and the public, ensuring innovators are rewarded while promoting the dissemination of knowledge and fostering further creation. It provides robust legal tools for businesses and creators to protect their assets within one of the world's largest integrated markets.

AI plays a dual role in this context: it acts as a powerful tool that assists humans in creating intellectual property, significantly accelerating processes and exploring new possibilities. Simultaneously, in some cases, AI independently generates works or inventions, blurring the lines of traditional authorship. This duality has far-reaching implications for existing IP laws, which were primarily designed with human creators in mind.

How AI Generates Intellectual Property

AI systems are increasingly demonstrating capabilities that lead to outputs traditionally considered intellectual property:

- **AI-Generated Art and Music:** AI systems like DALL-E, Stable Diffusion, Midjourney, and AIVA have demonstrated remarkable capabilities in creating visual art, music compositions, and even poetry. These systems are trained on vast datasets of existing works, learning patterns, styles, and structures, which allows them to produce novel outputs that mimic human creativity. For example, AI-generated artwork has not only been displayed in galleries but also auctioned for significant sums, such as the "Edmond de Belamy" painting, raising profound questions about authorship, originality, and copyright in the art world. These tools can generate a piece of music in a specific genre or a painting in the style of a famous artist within seconds.

- **AI in Scientific Discoveries:** AI is revolutionizing fields like medicine, materials science, and chemistry by accelerating research and discovery. Systems like DeepMind’s AlphaFold have solved complex, long-standing problems such as protein folding, which has immense implications for drug discovery, vaccine development, and understanding diseases. These breakthroughs often rely on AI to analyze vast amounts of data, identify correlations, and uncover solutions that would take human researchers years or even decades to achieve through traditional methods, pushing the boundaries of what constitutes an "invention."
- **AI in Software Development:** AI tools like GitHub Copilot, Tabnine, and Amazon CodeWhisperer assist developers by generating code snippets, suggesting completions, and even writing entire functions based on natural language prompts or existing code context. While this significantly accelerates software development and improves efficiency, the reliance on massive existing codebases for training introduces complex questions about copyright infringement, the originality of the generated code, and potential open-source license compliance issues.
- **AI-Generated Designs and Innovations:** In industries like architecture, engineering, and product design, AI systems are used to generate highly optimized designs, structural layouts, and innovative product concepts. These outputs often surpass human capabilities in terms of efficiency, material usage, and precision, leading to groundbreaking innovations. For instance, AI can design a lightweight, yet incredibly strong component for an aircraft or optimize the energy efficiency of a building layout. However, questions remain about whether such works, created primarily by a machine, can be patented or protected under traditional IP laws that typically require a human inventor.

AI as a Creator - The Case of "The Next Rembrandt"

In 2016, a project titled "The Next Rembrandt" unveiled a new painting created entirely by an AI. The project, a collaboration between ING Bank, Microsoft, and various art and tech institutions, aimed to demonstrate how data and technology could breathe new life into art. AI analyzed 346 paintings by Rembrandt, studying his brushstrokes, composition, and facial features. Using deep learning algorithms, it then generated a new portrait that mimicked Rembrandt's style so convincingly that it was 3D printed to replicate the texture of his brushwork.

This painting, while not created by a human hand, is a unique artistic work that clearly demonstrates the AI's ability to synthesize vast amounts of existing data into a novel output. It raises the fundamental question: if this painting were to be copyrighted, who

would be the author? The project team? Microsoft, which provided the AI technology? Or is the AI itself the author?

Challenges in Protecting AI-Generated Works

The emergence of AI-generated intellectual property presents significant challenges to existing IP frameworks. As noted by Harvard Business Review, examples may be:

- **Authorship and Ownership:** Current IP laws generally recognize humans as the sole creators of intellectual property. This creates a substantial legal gray area for AI-generated works. For instance, if an AI creates a painting, who holds the copyright? Is it the programmer who developed the AI, the user who provided the specific input prompt, or the company that owns and operates the AI system? These unresolved questions complicate the enforcement and commercialization of IP rights, potentially stifling investment in AI-driven creative industries.
- **Originality and Creativity:** IP protection often requires a demonstrable degree of originality and human creativity. AI systems, however, generate works by analyzing and replicating patterns from their vast training data. Determining whether these outputs meet the legal definition of "originality", meaning they are not merely a copy and reflect the author's own intellectual creation, is a highly contentious issue, particularly when AI systems rely heavily on pre-existing copyrighted works. This is a central debate in copyright law, as AI's generative process differs fundamentally from human creative intent.
- **Liability and Accountability:** When an AI system infringes on existing IP, such as creating music or images that closely resemble copyrighted material, assigning liability becomes incredibly challenging. Who is responsible for the infringement: the user who prompted the AI, the developer who coded the AI, the company that deployed the AI, or perhaps even the AI itself if it were to be granted legal personhood? This lack of clear accountability can lead to complex legal disputes, discourage the adoption of AI technologies due to legal uncertainty, and make it difficult for rights holders to seek redress.
- **Training Data and Copyright Infringement:** Many powerful AI systems, especially large language models and image generators, are trained on massive datasets that often include copyrighted works scraped from the internet without explicit permission or compensation from the original creators. This practice has led to numerous high-profile lawsuits against AI companies for using protected material to train their models. Resolving these issues requires a delicate balancing act: upholding the rights of creators to control their copyrighted works versus enabling

the development of robust and capable AI systems that require vast amounts of data for effective training.

- **Patents and Inventorship:** Patent law typically requires a named inventor, who must be a human being, to claim ownership of an invention. AI-generated inventions, such as novel drug compounds discovered by an AI system in pharmaceutical research, challenge this norm. If an AI system independently develops an innovative solution without direct human inventive input, it may not qualify for patent protection under current laws. Without a clear human inventor, such inventions might fall into the public domain, potentially discouraging significant investment in AI-driven scientific and technological innovation.
- **Global Disparities in IP Laws:** Different countries have varying legal frameworks and interpretations for intellectual property, creating additional complexities for protecting AI-generated works internationally. Some jurisdictions might lean towards recognizing AI as a tool, while others might explore new categories of rights. Harmonizing these laws to address AI-specific issues is a complex but necessary task to ensure consistent protection and encourage global innovation.

AI-Generated Painting and the Edmond de Belamy Controversy

In 2018, the AI-generated painting "Edmond de Belamy" was sold at Christie's for \$432,500, far exceeding its estimated value. Created by the Paris-based collective Obvious, the artwork was generated using a Generative Adversarial Network (GAN) trained on thousands of historical portraits. The GAN's generator created the image, while its discriminator refined it by comparing it to the training dataset.

The sale of the painting sparked significant debate about authorship and intellectual property. While Obvious marketed the artwork as a demonstration of AI's creative potential, critics questioned whether the collective, the programmers of the algorithm, or the creators of the original artworks in the training dataset deserved recognition. The dataset consisted of public domain works, yet some argued that the painting was inherently derivative, raising questions about originality. Adding complexity, the code used by Obvious was based on open-source work by Robbie Barrat, an AI artist and programmer. Barrat criticized Obvious for not sufficiently crediting his contributions, further fueling discussions on attribution in AI-generated works and exposing the legal gray areas when AI creates works based on existing intellectual property.

Lawsuits over AI Training Data and Copyright Infringement

A significant problem arising from generative AI is the use of copyrighted material in training datasets without explicit permission or licensing. This has led to multiple high-profile lawsuits against major AI developers. For instance, Stability AI, Midjourney, and DeviantArt have been sued by artists who allege that their copyrighted works were scraped from the internet and used to train image-generating AIs, effectively allowing the AI to create new works "in their style" without compensation or consent. Similarly, GitHub Copilot, an AI code-generation tool, has faced a class-action lawsuit alleging that its use of publicly available code (including open-source code with specific licensing requirements) for training constitutes copyright infringement.

These lawsuits argue that the AI models are essentially creating "derivative works" or are directly infringing on copyrights by reproducing protected material during training or by generating outputs that are too similar to existing copyrighted works. The core legal challenge is determining whether the act of training an AI on copyrighted material constitutes a "fair use" (or similar legal defense) or if it is an infringement.

These cases are pivotal in shaping the future of AI development, as they will define the boundaries of what data can be used to train AI models and who is liable when AI-generated content potentially infringes on existing intellectual property rights.

Conclusion

AI's ability to generate intellectual property fundamentally challenges traditional notions of authorship, ownership, and creativity. While these challenges are significant and necessitate careful consideration of liability and training data ethics, they also present crucial opportunities to rethink and modernize IP frameworks. By proactively addressing issues such as authorship, originality, and ethical training practices, we can work towards building a legal system that not only supports ongoing innovation in AI but also respects the rights of human creators and inventors in this new era. The ongoing legal battles and policy discussions underscore the urgent need for clarity in this evolving landscape.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary goal of Intellectual Property (IP) laws?

- a) To ensure all creative works immediately enter the public domain.
- b) To grant creators exclusive rights to their work for a specified period, incentivizing innovation.**
- c) To allow AI systems to freely use any data for training without restrictions.
- d) To standardize global legal frameworks for AI development without human oversight.

Question 2

One of the main challenges in protecting AI-generated works, as highlighted in the lesson, revolves around:

- a) The difficulty of storing AI-generated files on physical media.
- b) Determining the human **authorship** or **inventorship** when an AI creates a work or invention.**
- c) The excessive cost of electricity required to run AI systems for creation.
- d) The lack of public interest in AI-generated art or music.

Question 3

The "Edmond de Belamy" painting case study primarily illustrates which problem related to AI and IP?

- a) The risk of AI systems infringing on cybersecurity protocols.
- b) The challenge of assigning authorship and determining the originality of AI-generated artistic works.**
- c) The problem of AI algorithms developing biases in scientific discoveries.
- d) The difficulty in optimizing AI models for efficient code generation.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Ars Technica. "GitHub Copilot faces a new class-action lawsuit over its AI code" <https://arstechnica.com/tech-policy/2022/11/github-copilot-faces-a-new-class-action-lawsuit-over-its-ai-code/> Accessed July 28, 2025
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Lesson 7

Ensuring privacy in the age of AI

Expected reading time: 20 minutes

Main page content

Artificial Intelligence (AI) has revolutionized various industries, offering immense benefits such as predictive analytics, automation, and personalized experiences. However, as AI systems increasingly rely on vast datasets to learn patterns, make predictions, and automate decisions, privacy concerns have become a pressing issue. This lesson explores the intersection of AI and privacy, highlighting the challenges, risks, and integrated strategies for safeguarding personal data while ensuring the responsible and ethical use of AI technologies.

For a comprehensive visual overview of the complex relationship between AI and privacy, consider watching this TED TALK that delve on the relationship between AI and Privacy: https://www.youtube.com/watch?v=v733cvqouuc&ab_channel=TEDxTalks. This video provides valuable insights into the challenges and potential solutions for safeguarding data in an AI-driven world.

Privacy Concerns in AI and Their Resolutions

AI systems thrive on data. Their ability to learn patterns, make predictions, and automate decisions is entirely dependent on the vast amounts of information provided during their training and operation. This reliance often includes sensitive personal information, such as health records, financial transactions, online behavior, and even biometric data. While these datasets significantly enhance AI's capabilities and enable groundbreaking applications, they also raise fundamental questions about how data is collected, stored, processed, and ultimately used. The sheer volume and variety of data AI requires often come from diverse sources, including sensors, social media platforms, online interactions, and public records. As AI becomes more integrated into daily life, ensuring that these systems handle data responsibly and ethically becomes paramount. This delicate balance between maximizing AI's utility and rigorously protecting individual privacy lies at the heart of responsible AI development.

Data Collection and Consent

What is the main concern?

AI applications frequently collect data in ways that are not always transparent to users. For instance, social media platforms, smart home devices, and wearable technologies gather extensive information, often without users fully realizing the scope of data being shared or how it will be utilized. In many cases, terms and conditions are lengthy, complex, or unclear, leaving individuals unaware of how their data is being processed for AI training or inference. This lack of informed consent can erode trust and create significant opportunities for misuse, leading to what Stanford HAI refers to as "privacy harms" that go beyond just data breaches, including discrimination, manipulation, and loss of autonomy. As highlighted by DigitalOcean, AI's insatiable appetite for data means that companies are constantly seeking more information, often without adequate transparency about its collection and purpose.

How can we resolve the problem?

- **Enhanced Transparency and Granular Consent:** Organizations must adopt clear, concise, and easily understandable privacy policies. Users should be provided with granular control over what data is collected, how it's used by AI, and for what specific purposes. This includes "just-in-time" notifications and opt-in mechanisms for sensitive data categories.
- **Privacy by Design:** As emphasized by Tripwire, privacy should be built into AI systems from the ground up, not as an afterthought. This means designing data collection mechanisms, processing pipelines, and AI models with privacy principles embedded from the initial stages.
- **Data Minimization:** Collect only the data that is strictly necessary for the AI system's intended purpose, reducing the overall privacy risk. This principle is a core tenet of regulations like GDPR.

Reidentification Risks

What is the main concern?

Even when data is ostensibly anonymized or de-identified, it can still pose significant privacy risks. Advanced AI techniques, combined with powerful computational resources and the availability of vast public datasets, enable the reidentification of individuals by cross-referencing seemingly unrelated pieces of information. For example, combining anonymized health records with publicly available demographic data or even online purchase histories can reveal private medical information about specific individuals. Stanford HAI's white paper on "Rethinking Privacy in the AI Era" points out that traditional anonymization techniques are often insufficient against sophisticated re-identification

attacks, especially when dealing with high-dimensional datasets common in AI. This risk is particularly significant in highly sensitive domains like healthcare, finance, and government services.

How can we resolve the problem?

- **Differential Privacy:** This technique introduces statistical noise into datasets before AI training, ensuring that individual data points cannot be traced back to specific users. It provides a strong mathematical guarantee of privacy, making it nearly impossible to infer whether any single individual's data was included in the dataset, even with auxiliary information. This approach enables AI systems to analyze aggregate patterns in data while preserving individual privacy.
- **Synthetic Data Generation:** Instead of using real personal data, synthetic data is generated to statistically mimic the properties and patterns of real-world datasets without containing any actual personal information. This allows AI models to be trained and tested effectively while safeguarding privacy, making it a promising solution for industries like finance and healthcare where real data is highly sensitive.
- **Secure Multi-Party Computation (SMC) and Homomorphic Encryption:** These advanced cryptographic techniques allow computations to be performed on encrypted data without ever exposing the raw, sensitive information. SMC enables multiple parties to jointly compute a function over their inputs while keeping those inputs private, while homomorphic encryption allows computations directly on encrypted data. This ensures that sensitive data remains protected throughout the entire AI processing pipeline, from training to inference.

Bias and Discrimination

What is the main concern?

Privacy concerns are intrinsically linked with issues of fairness and potential discrimination in AI systems. Biased training data, often reflecting historical societal inequalities or skewed collection practices, can lead to AI models making discriminatory decisions, disproportionately impacting certain demographic groups. For instance, predictive models used in hiring, loan applications, or even criminal justice could inadvertently exclude individuals based on race, gender, or socioeconomic status due to flaws in the data they were trained on. This not only violates individual privacy through unfair categorization but also perpetuates systemic inequality and can lead to real-world harm, as highlighted by CSIS, which stresses that biased AI can lead to "unfair and discriminatory outcomes."

How can we resolve the problem?

- **Fairness-Aware AI Development:** Implement rigorous bias detection and mitigation techniques throughout the AI lifecycle, from data collection and preprocessing to model training and deployment. This includes auditing datasets for representativeness and using fairness metrics to evaluate model performance across different demographic groups.
- **Diverse Development Teams and Human Oversight:** As suggested by Stanford HAI, diverse teams are crucial for identifying and addressing biases that might be overlooked by homogeneous groups. Additionally, integrating "human-in-the-loop" oversight ensures that critical AI-driven decisions are reviewed and validated by human experts, preventing the unchecked propagation of discriminatory outcomes.
- **Explainable AI (XAI):** Develop AI models that are transparent and interpretable, allowing developers and users to understand how decisions are made. This helps in identifying and rectifying sources of bias and discrimination.

AI-Driven Homelessness Prediction

In several cities, social service agencies and non-profits have explored using AI to predict individuals or families at high risk of homelessness, aiming to intervene proactively. These systems often analyze various datasets, including public assistance records, healthcare visits, and interactions with the justice system. While the intention is to allocate resources more effectively and prevent homelessness, these AI models can inadvertently embed and amplify existing societal biases. For instance, if the training data disproportionately links certain demographic groups or neighborhoods to higher risk factors (due to systemic inequalities, not individual behavior), the AI might unfairly flag individuals from those groups, leading to increased scrutiny or even stigmatization.

Furthermore, the aggregation of diverse datasets, even if initially de-identified, presents reidentification risks. Combining information from various social service touchpoints could inadvertently reveal sensitive personal details about vulnerable individuals, potentially exposing their housing status, health conditions, or other private circumstances to unauthorized parties. This scenario highlights the tension between using AI for social good and ensuring that predictive models do not perpetuate discrimination or compromise the privacy of already marginalized populations. Responsible AI development in this context demands careful data governance, bias auditing, and strong ethical oversight.

Data Breaches and Cybersecurity

What is the main concern?

Large-scale data breaches remain a critical and evolving concern, especially as AI systems often centralize and process vast amounts of sensitive personal information. Hackers targeting AI systems or their underlying data infrastructure can gain unauthorized access to databases, leading to identity theft, financial fraud, reputational damage, and severe emotional harm for individuals. As AI models themselves can be targets (e.g., adversarial attacks), protecting the integrity and confidentiality of the data used by and generated by AI is a constant challenge, particularly as cyberattacks grow more sophisticated and AI itself can be used by malicious actors. Tripwire emphasizes that AI systems, due to their reliance on large datasets, become attractive targets for cybercriminals.

How can we resolve the problem?

- **Robust Encryption and Access Controls:** Implement strong encryption for data at rest, in transit, and in use (as mentioned with homomorphic encryption). Strict access controls, multi-factor authentication, and regular security audits are essential to prevent unauthorized access to AI systems and their data repositories.
- **Federated Learning:** This technique allows AI models to be trained across decentralized devices or servers without requiring the transfer of raw, sensitive data to a central location. Only model updates (weights) are shared, significantly minimizing the risk of a large-scale data breach. This approach is especially relevant for applications like personalized mobile assistants, healthcare analytics, and collaborative research where data privacy is paramount.
- **Continuous Monitoring and Threat Intelligence:** Employ advanced cybersecurity tools, including AI-powered solutions, to continuously monitor for anomalies, detect potential threats, and respond rapidly to security incidents. Staying updated with the latest threat intelligence is crucial for proactively defending against sophisticated cyberattacks.
- **Regulatory Compliance and Accountability Frameworks:** Adherence to stringent privacy regulations such as the General Data Protection Regulation (GDPR) in the EU, the California Consumer Privacy Act (CCPA) in the US, and other emerging frameworks globally is essential. These regulations establish clear guidelines for data handling, mandate data protection impact assessments, empower individuals with control over their personal information, and hold organizations accountable for misuse or breaches, often imposing significant penalties.

Privacy Concerns in Mental Health AI Chatbots

Several mental health AI chatbots and apps have emerged, promising accessible support and therapy. While offering a valuable service, these platforms often collect highly sensitive personal data, including users' emotional states, thoughts, symptoms, and even potentially suicidal ideations.

In 2023, a report by the Mozilla Foundation reviewed 32 mental health and prayer apps, finding that 28 of them had problematic data privacy and security practices. Many collected vast amounts of personal health information, shared it with third parties (including advertisers), and had vague or misleading privacy policies that made it difficult for users to understand how their deeply personal data was being handled.

This poses significant privacy risks: even if data is initially anonymized, the highly specific nature of mental health conversations could make reidentification possible through sophisticated techniques, especially if combined with other data points. The sharing of this sensitive information with advertisers or other third parties without explicit, truly informed consent is a major breach of trust and privacy, potentially leading to targeted advertising based on vulnerable states or even discrimination. This case underscores the critical need for robust privacy-preserving techniques and transparent data practices when AI interacts with highly personal and sensitive user information in non-profit or social service contexts.

Ethical Considerations

Privacy in AI is not just a technical issue; it is deeply rooted in ethics. Developers and organizations must prioritize transparency, accountability, and fairness in their AI systems. Ethical AI development involves clear communication about how data is collected, stored, and used, as well as implementing robust safeguards against potential misuse. As emphasized by CSIS, establishing a "baseline for responsible AI" includes prioritizing data privacy and security as fundamental ethical principles. AI developers should also consider the broader societal implications of their systems. Ensuring that AI technologies respect cultural and individual values while minimizing harm is crucial. Establishing independent ethical review boards, incorporating diverse stakeholder input, and conducting regular impact assessments can help address these concerns effectively and build public trust.

As AI continues to evolve, so will the methods for preserving privacy. Emerging technologies like secure multi-party computation, zero-knowledge proofs, and advanced privacy-preserving machine learning techniques offer new ways to address privacy challenges, enabling the use of sensitive data without compromising individual rights or exposing personal information. The future of AI privacy will also depend on global collaboration

between technologists, policymakers, ethicists, and civil society. Creating universal standards, fostering dialogue between stakeholders, and developing adaptable regulatory frameworks can help bridge the gap between rapid innovation and ethical responsibility, ensuring that AI serves humanity in a way that respects fundamental rights.

Conclusion

AI and privacy are intrinsically linked, presenting both profound challenges and transformative opportunities. While AI offers immense potential across industries, it also raises significant privacy concerns that demand careful and proactive attention. By adopting advanced technical solutions, adhering to robust regulatory standards, fostering an ethical mindset, and ensuring continuous oversight, we can harness the power of AI responsibly, ensuring it serves humanity's progress without compromising individual rights and fundamental freedoms.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

According to the lesson, why has privacy become a pressing issue as AI systems become more advanced?

- a) AI systems require less data, making data protection simpler.
- b) AI systems increasingly rely on large datasets, often including sensitive personal information.**
- c) AI systems are becoming less capable of making predictions.
- d) Privacy concerns are primarily a technical issue, easily solved by basic encryption.

Question 2

Which of the following describes the privacy concern known as "Reidentification Risks" in AI?

- a) When AI models are trained on too little data, leading to poor performance.
- b) The process of completely deleting all personal data from AI systems.
- c) The ability to link anonymized data back to specific individuals by cross-referencing other datasets.**
- d) The risk of AI systems becoming too transparent about their decision-making processes.

Question 3

Which strategy directly addresses the concern of transferring raw, sensitive data to a central server for AI training, as discussed in the lesson?

- a) Regulatory Compliance (e.g., GDPR).
- b) Differential Privacy.
- c) Federated Learning.
- d) Synthetic Data Generation.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

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Lesson 8

Overcoming biases thanks to the responsible use of AI

Expected reading time: 13 minutes

Main page content

Bias in Artificial Intelligence (AI) is one of the most significant challenges facing the field today. It can profoundly undermine the accuracy, fairness, and trustworthiness of AI systems, leading to unintended and often severe consequences that disproportionately affect certain groups. This lesson explores what bias in AI is, how it arises, and the comprehensive strategies for addressing it to ensure ethical, equitable, and responsible AI development.

For a concise and insightful visual explanation of how bias can enter AI systems, particularly through the data they learn from, consider watching Code.org's video on "Training Data and Bias in Machine Learning" [<https://www.youtube.com/watch?v=x2mRoFNm22g>]. This resource effectively illustrates that the quality and diversity of the data fed to machines directly impact their fairness, emphasizing that "data is code" in machine learning and highlighting the human responsibility in ensuring unbiased training datasets.

What are Bias?

Bias in AI refers to systematic errors or deviations in the outputs of AI systems that result from prejudices embedded in their design, training data, or deployment processes. These biases lead to unfair or discriminatory outcomes, manifesting as unequal treatment of individuals based on characteristics such as gender, race, ethnicity, age, socioeconomic status, or other protected attributes. While AI systems are often perceived as objective due to their computational nature, they are, in reality, a direct reflection of the data they are trained on and the human assumptions, values, and choices embedded in their creation. As highlighted in the European Commission's Ethics Guidelines for Trustworthy AI, bias is a critical concern, capable of leading to "unjustified discriminatory impacts on individuals or groups" by unfairly predicting, evaluating, or classifying. The goal of AI is not merely to automate, but to automate justly and fairly.

Main Sources of Bias

Understanding the origins of bias is crucial for its effective mitigation. Bias can creep into AI systems at various stages of their lifecycle:

- **Bias in Training Data:** This is arguably the most prevalent source of AI bias. Most AI models learn from vast amounts of historical data, which often inherently reflects existing societal inequalities, historical discrimination, or skewed real-world distributions. For instance, if an AI model designed for hiring recommendations is trained on historical data from a company with a past gender imbalance in leadership roles, it might inadvertently learn to prefer male candidates for senior positions, regardless of female candidates' qualifications. A notable case is Amazon's scrapped AI recruiting tool, which showed a clear bias against women by penalizing resumes containing words like "women's" or indicating female-only colleges, because it was trained on historical hiring data dominated by male employees.

Bias in Medical AI for Disease Diagnosis

AI tools are increasingly used in medical diagnosis, from analyzing medical images to predicting disease risk. However, bias embedded in their training data can lead to serious health inequities. For example, an AI system designed to detect skin cancer from images might perform significantly worse on patients with darker skin tones if its training dataset consists predominantly of images from lighter-skinned individuals. This lack of representativeness means the AI struggles to accurately identify lesions or abnormalities on diverse skin types.

Similarly, algorithms used to predict kidney disease progression have been found to be less accurate for non-white patients, or models for diagnosing cardiac conditions might be less effective for women if the training data overrepresents male patients with typical symptoms. These biases can lead to delayed diagnoses, misdiagnoses, and ultimately, poorer health outcomes for underrepresented groups, exacerbating existing disparities in healthcare access and quality.

- **Bias in Data Collection:** The way data is collected, curated, or labeled can also introduce significant bias. If a dataset is not representative of the entire population it aims to model, the AI system may perform poorly or unfairly favor certain groups over others. For example, many early facial recognition systems were widely

criticized for performing significantly worse on darker-skinned individuals and women due to their severe underrepresentation in the training datasets used to develop these technologies. Researchers like Dr. Joy Buolamwini and Timnit Gebru's groundbreaking work through the Gender Shades project revealed significant disparities in accuracy across different demographic groups, demonstrating how unrepresentative data collection leads to biased outcomes in critical applications. Similarly, biases can arise if data is collected primarily from certain geographic regions or socioeconomic strata, leading to AI solutions that are not globally or socially equitable.

- **Algorithmic Bias (or Systemic Bias):** Even when training data is considered robust and diverse, biases can be introduced through the algorithm's design, its underlying mathematical assumptions, or its optimization criteria. For example, if a machine learning model designed for predictive policing is optimized solely on maximizing arrest rates, it might inadvertently lead to algorithms that disproportionately target specific neighborhoods or communities that have been historically over-policed, regardless of actual crime rates. This creates a self-reinforcing cycle where more arrests in certain areas lead to more data from those areas, further skewing the algorithm's predictions. The COMPAS (Correctional Offender Management Profiling for Alternative Sanctions) tool, used in U.S. courts, demonstrated algorithmic bias by disproportionately flagging Black defendants as higher risk for re-offending compared to white defendants with similar criminal histories, even when the raw data for certain factors was deemed non-biased. This shows how the weighting or interpretation of factors within the algorithm itself can embed bias.

Bias in Loan Approval Algorithms

Several studies and anecdotal evidence have revealed bias in AI-powered loan approval systems. For instance, mortgage lending algorithms or personal loan applications using AI have shown tendencies to disproportionately deny loans or offer less favorable terms (higher interest rates) to applicants from certain racial or ethnic minority groups, or those residing in specific low-income neighborhoods. This bias often arises not from explicit racial markers, but from proxy data points such as zip codes, credit scores influenced by historically discriminatory practices, or even linguistic patterns in applications that correlate with demographic groups.

Even if an algorithm is not explicitly programmed to discriminate, if it learns from historical lending data where discriminatory practices were prevalent, it can perpetuate these biases. This leads to qualified individuals from marginalized communities being

unfairly denied access to credit, hindering economic mobility and reinforcing systemic inequality. Addressing this requires careful auditing of algorithms and their outputs for disparate impact.

- **Bias in Deployment/Interaction:** The context in which AI systems are deployed, or how humans interact with them, can also contribute to bias. An AI system that performs fairly in a controlled test environment might exhibit bias when deployed in real-world settings with diverse user groups, varied inputs, or specific social dynamics. For instance, if an AI-powered medical diagnostic tool is deployed in a hospital setting where clinicians are already predisposed to trust AI recommendations without critical review, and the AI was trained on data primarily from one demographic, it might lead to consistently missed diagnoses or delayed treatment for underrepresented patient groups. This form of bias arises from the interaction between the AI's output and human decision-making, emphasizing that AI is part of a larger socio-technical system.

Consequences of Bias in AI for Social Economy Organizations (SEOs)

The impact of bias in AI can be far-reaching and severe, eroding trust and leading to significant harm, particularly for Social Economy Organizations (SEOs) and the vulnerable populations they serve:

- **Exacerbated Inequalities for Beneficiaries:** SEOs often work with marginalized or vulnerable groups. Biased AI systems can lead to unfair outcomes in critical areas such as access to social services, allocation of aid, or even eligibility for support programs. For example, an AI system designed to prioritize housing assistance might inadvertently deprioritize certain ethnic groups due to historical biases in data, leading to a denial of crucial support for those who need it most.
- **Erosion of Trust and Engagement:** Trust is paramount for SEOs. If beneficiaries perceive that AI systems are treating them unfairly or are biased against their community, it can severely erode trust in the organization and disincentivize engagement with vital services. This can undermine the very mission of SEOs to foster inclusion and social cohesion.
- **Misallocation of Resources:** Biased AI could lead to inefficient or inequitable allocation of scarce resources. For instance, a predictive model for identifying individuals at risk of poverty might misclassify certain demographics, leading to over-resourcing in some areas and under-resourcing in others, thereby failing to address actual needs effectively.

- **Reputational Damage and Legal Risks:** For SEOs, a reputation for fairness and ethical conduct is crucial for fundraising and public support. Instances of AI bias can lead to significant reputational damage, public backlash, and even legal challenges under anti-discrimination laws, diverting resources from core mission activities. The European Union's proposed AI Act explicitly targets AI systems deemed "high-risk" due to their potential for bias and discrimination, meaning SEOs deploying such systems would face strict compliance requirements and potential legal repercussions if biases lead to fundamental rights violations.
- **Ineffective Program Design and Evaluation:** If AI is used to evaluate the effectiveness of social programs or design new interventions, biased outputs can lead to flawed conclusions and the development of programs that are ineffective or even harmful to certain groups, wasting valuable resources and failing to achieve desired social impact.

Beyond these tangible consequences, bias in AI also raises profound ethical concerns about fairness, accountability, and the role of technology in promoting social justice, directly challenging the core values of the social economy.

Strategies for Mitigating Bias in AI

Addressing bias in AI requires a multi-faceted approach, integrating technical solutions with ethical considerations and robust oversight throughout the entire AI lifecycle.

- **Utilizing Diverse and Representative Data:** This is foundational. Ensuring that training datasets are truly diverse and representative of the full range of the target population is crucial. This involves not only collecting data that spans various demographic groups but also actively identifying and addressing gaps or imbalances in the data to prevent underrepresentation of specific populations. Techniques include oversampling minority classes, synthetic data generation to augment underrepresented data, and careful data annotation processes to avoid perpetuating human labeling biases. Regular auditing of data sources and collection methodologies is essential to proactively identify and rectify sources of bias before they impact the model. The European Union's High-Level Expert Group on AI emphasizes the importance of robust and representative datasets as a key requirement for trustworthy AI.
- **Bias Audits and Testing (Fairness Auditing):** Regular, systematic audits and rigorous testing of AI systems are indispensable for identifying and quantifying biases. This extends beyond initial development to continuous monitoring in

deployment. Tools and frameworks exist to quantify the extent of bias using various fairness metrics (e.g., demographic parity, equalized odds, predictive parity), allowing developers to assess how well an AI performs across different subgroups. These audits should be conducted by independent third parties where possible, and results should be used to provide actionable insights for model improvement and ensure compliance with fairness objectives. The National Institute of Standards and Technology (NIST) in the US has developed comprehensive guidance for AI risk management, including methodologies for bias detection and measurement, advocating for a lifecycle approach to managing AI risks, including bias.

- **Transparent and Explainable Algorithms (XAI):** Transparency in AI systems allows stakeholders, from developers to end-users and regulators, to understand how decisions are made. Explainable AI (XAI) techniques enable developers to dissect the "black box" of complex AI models, identifying which features or factors disproportionately influence outcomes for certain groups. This understanding is critical for diagnosing the root causes of bias within the model's logic or internal representations, rather than just observing its effects. Techniques include LIME (Local Interpretable Model-agnostic Explanations) and SHAP (SHapley Additive exPlanations) values, which provide insights into individual predictions. XAI is crucial for building trust and enabling accountability, as recommended by the OECD Principles on AI.
- **Human Oversight and Ethical AI Governance:** Incorporating meaningful human oversight into AI decision-making processes serves as a critical safeguard against biased outcomes. Humans should evaluate AI recommendations, question unexpected results, and retain the ability to intervene and override AI decisions when necessary to ensure fairness, especially in high-stakes applications. Beyond individual intervention, organizations should establish robust ethical AI governance frameworks. This includes creating internal ethical review boards, defining clear lines of accountability, and implementing policies for bias detection, reporting, and remediation. The European Commission's AI Act specifically mandates human oversight for high-risk AI systems, underlining its importance in regulatory frameworks.
- **Algorithmic Fairness (Bias Mitigation Techniques):** Researchers and developers can actively design algorithms with built-in fairness constraints. This involves applying specific techniques either *pre-processing* (adjusting the data before training), *in-processing* (modifying the training algorithm), or *post-processing* (adjusting the model's output after training) to ensure the model does not disproportionately impact certain groups. Examples include reweighting training data points to give more emphasis to underrepresented groups, adding regularization terms to the learning objective to penalize unfairness, or modifying decision thresholds to achieve more equitable outcomes across subgroups. This

active intervention in the algorithm's learning process is a key area of research and development in fair AI.

- **Ethical AI Development Practices and Diverse Teams:** Organizations should establish comprehensive ethical guidelines for AI development that explicitly emphasize fairness, accountability, and inclusivity throughout the entire AI lifecycle. Crucially, building cross-disciplinary teams that include not only AI engineers but also ethicists, social scientists, legal experts, and domain experts (e.g., healthcare professionals for medical AI) is vital. These diverse perspectives help anticipate, identify, and address potential biases from multiple angles, ensuring that AI solutions are developed with a holistic understanding of their societal impact. Continuous education and training for AI practitioners on ethical AI principles are also key, fostering a culture of responsible innovation.

Conclusion

Bias in AI is not merely a technical problem; it raises profound ethical and societal questions. Who is responsible when an AI system produces biased outcomes that cause harm? How do we balance the immense potential for innovation with the fundamental need for fairness, equity, and human rights? These questions underscore the paramount importance of embedding ethical considerations of fairness, transparency, and accountability from the very outset of AI development.

Moreover, addressing bias is absolutely essential for building and maintaining trust in AI technologies. Users, consumers, and citizens must feel confident that AI systems will treat them equitably, regardless of their background or characteristics. This trust is critical for the widespread adoption of AI technologies and for ensuring that AI contributes positively to society, rather than exacerbating existing inequalities or creating new forms of discrimination.

By understanding its diverse sources, recognizing its far-reaching consequences, and proactively implementing comprehensive mitigation strategies, we can work toward developing AI systems that are inherently fair, equitable, and trustworthy. Addressing bias is not just a technical necessity but a moral imperative, ensuring that AI technology benefits all members of society without perpetuating or amplifying existing inequalities. The ongoing commitment to ethical AI development is crucial for harnessing AI's full potential responsibly.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What does "Bias in AI" primarily refer to, as defined in the lesson?

- a) AI systems expressing personal opinions or preferences.
- b) Systematic errors in AI outputs resulting from prejudices in design, data, or deployment.**
- c) The process of an AI learning new information quickly.
- d) An AI system's ability to operate autonomously without human intervention.

Question 2

The "Gender Shades project" by Dr. Joy Buolamwini and Timnit Gebru, mentioned in the lesson, primarily demonstrated bias arising from which source?

- a) Algorithmic Bias
- b) Bias in Deployment/Interaction
- c) Bias in Data Collection
- d) Bias in Output Interpretation

Question 3

For Social Economy Organizations (SEOs), a key consequence of bias in AI, as highlighted in the lesson, is:

- a) A guaranteed increase in funding due to AI adoption.
- b) Enhanced efficiency in all aspects of their operations without any drawbacks.
- c) The potential to exacerbate inequalities for beneficiaries and erode trust in the organization.**
- d) Simplified compliance with all existing privacy regulations.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

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Lesson 9

Reducing AI-generated footprint

Expected reading time: 17 minutes

Main page content

The rise of Artificial Intelligence (AI) and the consequent proliferation of data centers have significantly transformed the way we process, store, and utilize information. However, this transformation comes with a notable environmental cost: energy consumption. As AI applications grow more sophisticated, their computational demands have led to increased reliance on data centers, raising concerns about energy efficiency and sustainability. This lesson explores the intricate relationship between AI, data centers, and energy consumption, highlighting the challenges and strategies for achieving a sustainable digital future.

To gain a deeper understanding of the significant energy demands of our digital world and the challenges of powering AI, cryptocurrency, and cloud storage with green energy, we highly recommend watching this insightful video: "Can Green Energy Keep Up with AI, Crypto, and Cloud Storage?" [https://www.youtube.com/watch?v=YGfJeH5HRDQ&ab_channel=Vox]. This video explores how the exponential growth of data centers, driven by AI and other technologies, is rapidly increasing global electricity consumption. It delves into the immense power required for training large AI models and even for single ChatGPT interactions, highlighting that current renewable energy infrastructure is struggling to keep pace.

The Role of Data Centers in AI Systems

Data centers are the backbone of modern computing. They store, process, and manage the vast amounts of data that fuel AI applications, ranging from machine learning algorithms to real-time analytics. These facilities house powerful servers, networking equipment, and cooling systems that ensure the smooth, continuous operation of digital services.

AI's reliance on data centers stems from the profound need for high-performance computing resources. Training sophisticated AI models, particularly large-scale ones like generative AI or deep learning networks, requires immense computational power and

storage. These processes involve billions of calculations, often conducted over extended periods, which substantially increase energy demands. For instance, the training phase of a complex AI model can involve computational tasks equivalent to several years of continuous operation for thousands of high-end servers.

The escalating demand for AI processing translates directly into significant energy consumption across several key areas:

- **AI Training and Inference:** Training AI models is an exceptionally energy-intensive process. A single large-scale model can consume as much energy as multiple households do in a year. For example, estimates suggest that training OpenAI's GPT-3 model alone could consume approximately 1,287 megawatt-hours (MWh) of electricity, equivalent to the annual electricity consumption of about 120 average US homes, and generating roughly 502 tonnes of CO₂ emissions. Once trained, deploying these models for inference (e.g., making predictions or real-time decisions, such as those powering personalized recommendations on streaming platforms) also requires continuous computational resources, further adding to energy consumption.
- **Cooling Systems:** Data centers generate significant amounts of heat due to the continuous operation of high-powered servers. To prevent overheating and maintain optimal performance, extensive cooling systems are indispensable. These cooling systems often consume a substantial portion of a data center's total energy – accounting for up to 40% of a data center's energy use, as highlighted by the World Economic Forum. This creates a compounding effect on overall energy usage, as more powerful servers require more robust cooling.
- **Carbon Footprint:** The environmental impact of data centers is heavily dependent on their energy source. In regions where fossil fuels are the primary energy source for the grid, the carbon footprint of AI and data center operations can be substantial. This reliance on carbon-intensive electricity has raised significant concerns about the long-term sustainability of AI's rapid growth. Recent reports emphasize that the energy demands of generative AI are growing so rapidly that they could exacerbate global carbon emissions if not powered by renewable sources.
- **AI Applications and Scale:** As AI becomes increasingly integrated into diverse industries like healthcare (e.g., diagnostic imaging analysis), finance (e.g., fraud detection), and entertainment (e.g., content recommendation engines), the scale of data processing continues to expand exponentially. AI-driven services such as personalized recommendations, autonomous systems, and natural language

processing require constant computational resources, placing an ever-growing burden on data centers.

The Enormous Energy Footprint of Generative AI Training

The development of large language models (LLMs) and other generative AI technologies has brought unprecedented capabilities but also exposed their staggering energy demands. Training a single, cutting-edge generative AI model can consume vast amounts of electricity. For instance, researchers estimated that training OpenAI's GPT-3 model consumed 1,287 MWh of electricity. To put this into perspective, this is roughly equivalent to:

- The annual electricity consumption of 120 average American homes.
- Generating 502 tonnes of carbon dioxide emissions, comparable to the lifetime emissions of two cars.

This energy is needed not just for the computational cores but also for the extensive cooling infrastructure required to prevent servers from overheating during months of continuous operation. As AI models grow even larger and more complex, and as more companies train their own versions, the collective energy demand becomes a critical sustainability challenge, demanding innovative solutions to mitigate their environmental impact.

Strategies for Reducing Energy Consumption

Achieving a sustainable digital future requires a concerted effort across multiple fronts, from hardware design to algorithmic optimization and infrastructure management:

- **Energy-Efficient Hardware:** Continuous advancements in hardware technology are crucial. This includes the development of more energy-efficient processors (CPUs), Graphics Processing Units (GPUs), and specialized AI accelerators (like Google's TPUs). These components are specifically designed for AI workloads, delivering higher performance per watt. For example, NVIDIA's newer H100 GPU offers significantly improved energy efficiency compared to previous generations, performing complex AI calculations with less power consumption, thereby reducing the overall energy footprint of AI training and inference.
- **Optimized AI Algorithms:** Researchers are actively developing more efficient AI algorithms and model architectures that require less computational power without sacrificing accuracy. Techniques such as:

- Model Pruning: Removing redundant or less important connections in a neural network.
 - Quantization: Reducing the precision of the numbers used in calculations (e.g., from 32-bit to 8-bit floating points), which can significantly reduce computational load and memory footprint.
 - Knowledge Distillation: Training a smaller, more efficient "student" model to mimic the behavior of a larger, more complex "teacher" model.
- **Green Data Centers and Renewable Energy:** The adoption of renewable energy sources is a critical step toward sustainable data center operations. Many leading tech companies, such as Google, Microsoft, and Amazon Web Services (AWS), are making significant investments in wind, solar, and hydroelectric power to match 100% of their electricity consumption with renewable energy purchases, drastically reducing their carbon footprint. Beyond energy sourcing, green data centers also implement advanced cooling techniques. This includes:
 - Liquid Cooling: Directing liquid over or near hot components, which is significantly more efficient than air cooling.
 - Evaporative Cooling: Utilizing water evaporation to cool air, reducing reliance on energy-intensive chillers.
 - Locating Facilities in Cooler Climates: Strategically placing data centers in regions with naturally lower ambient temperatures, such as Nordic countries, to minimize the energy needed for cooling.
 - **Federated Learning:** This decentralized AI training approach fundamentally alters the data flow, reducing the need to transfer large datasets to central servers. By training models locally on edge devices (like smartphones or IoT sensors) and only sending aggregated model updates back to a central server, federated learning minimizes the energy demands associated with extensive data transfer and the massive centralized processing typical of traditional methods. This approach is particularly effective for privacy-sensitive and energy-constrained applications.
 - **Energy Monitoring and Optimization:** Advanced energy monitoring systems can track and optimize power usage within data centers in real-time. Critically, AI itself is increasingly being used to predict and manage energy consumption within data centers, creating a powerful feedback loop where AI helps improve its own energy efficiency. For example, AI can analyze temperature, workload, and external weather data to precisely control cooling systems, preventing unnecessary energy expenditure.

Google's DeepMind AI Optimizing Data Center Cooling

One of the most compelling examples of AI contributing to its own sustainability is Google's use of DeepMind AI to optimize the cooling systems of its data centers. Cooling can account for a substantial portion of a data center's energy use, typically ranging from 30% to 40%.

In 2016, DeepMind developed a neural network that took historical data from thousands of sensors within Google's data centers (including temperatures, power, pump speeds, and fan speeds) and learned how to predict the optimal Power Usage Effectiveness (PUE) by adjusting various parameters. By allowing the AI to manage and optimize its cooling operations, Google was able to reduce the energy consumption for cooling by 40%, leading to a 15% improvement in overall data center energy efficiency. This real-world application demonstrates that AI, while energy-intensive itself, can also be a powerful tool for achieving significant energy savings in the very infrastructure that supports it.

Policy, Regulation, and Ethical Considerations

The environmental cost of AI and data centers extends beyond mere energy consumption; it raises profound ethical questions about resource allocation, environmental justice, and broader societal impact, necessitating robust policy and regulatory frameworks.

Governments and international organizations play a critical role in shaping the energy consumption landscape. Policies encouraging the use of renewable energy, imposing stringent efficiency standards, and providing incentives for green infrastructure can significantly drive the transition to sustainable practices. The European Union has been a frontrunner in this regard. Its Green Deal, aiming for climate neutrality by 2050, directly impacts the digital sector by promoting sustainable energy use. Furthermore, the Climate Neutral Data Centre Pact, a significant self-regulatory initiative for the European cloud and data center industry, commits signatories to achieving climate neutrality by 2030, in alignment with the Green Deal's objectives. These frameworks, along with specific EU directives on energy efficiency for data centers, establish clear guidelines, ensure accountability, and encourage innovation in energy-efficient solutions across the bloc.

From an ethical standpoint, as AI expands its global footprint, its energy demands could strain local power grids, disproportionately affecting regions with limited or less reliable energy resources, potentially diverting energy away from other critical needs. Balancing technological advancement with equitable energy distribution and access is a complex challenge that requires global cooperation and thoughtful planning. Moreover, the environmental impact of AI development calls for greater transparency and accountability from organizations, compelling them to proactively disclose their energy usage, carbon

emissions, and sustainability strategies. This transparency fosters public trust and enables stakeholders to hold companies accountable for their environmental footprint.

The future of AI and data centers lies in a continuous pursuit of innovation and collaborative partnerships. Emerging technologies, such as quantum computing and advanced cooling methods, offer promising avenues to drastically reduce energy demands. Additionally, ongoing research into AI efficiency will enable developers to create increasingly powerful models with minimal environmental impact. Sustainability will depend on fostering robust partnerships between industry leaders, governments, civil society, and environmental organizations, whose collaborative efforts can accelerate the adoption of renewable energy, drive policy changes, and promote a shared commitment to significantly reducing AI's environmental footprint.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following is NOT a primary reason for significant energy consumption in AI and data centers, as discussed in the lesson?

- a) Training and inference of AI models.
- b) Extensive cooling systems for servers.
- c) The carbon footprint of electricity generation.
- d) The physical weight of server racks.

Question 2

According to the lesson, what is one of the key strategies for reducing energy consumption in data centers related to their physical infrastructure?

- a) Increasing the number of physical security guards.
- b) Implementing advanced cooling techniques like liquid cooling or locating facilities in cooler climates.
- c) Using only older, less powerful servers.
- d) Decreasing data storage capacity.

Question 3

The lesson mentions the European Union's Green Deal and the Climate Neutral Data Centre Pact as examples of:

- a) New AI algorithms designed for energy efficiency.
- b) Industry-led initiatives for improving AI model accuracy.
- c) Policy and regulatory efforts to promote sustainable data center practices.
- d) Ethical guidelines for AI development focusing on bias mitigation.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Ars Technica. "Training a single AI model can emit as much carbon as five cars in their lifetimes" <https://arstechnica.com/science/2019/06/training-a-single-ai-model-can-emit-as-much-carbon-as-five-cars-in-their-lifetimes/> Accessed: July 28, 2025
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How can AI help SEOs?

The module includes the following lessons:

10. Unlock your organisation's potential with AI

11. AI tools to support decision-making

12. Use AI to help organisations in grant-seeking and fundraising

13. AI tools to automate tasks

Lesson 10

Unlock your organization potential with AI

Expected time effort: 10 min

Main page content

This session explores the strategic integration of Artificial Intelligence within social economy organizations, focusing on how AI can optimize management processes while reinforcing a social mission. Integrating AI allows for the automation of repetitive tasks and the improvement of resource allocation, ensuring that principles like fairness and accessibility remain central to the organization's goals. By streamlining internal operations, human teams can shift their focus toward more strategic, creative, and personal aspects of their work. Furthermore, AI enhances the experience for diverse stakeholders; beneficiaries receive more personalized services tailored to their specific needs, while donors and public funders gain trust through detailed, transparent, and data-driven impact reports.

However, this transition is not without its hurdles, as SEOs often face limited financial resources and a gap in technical skills, requiring a significant cultural shift and proactive training to overcome internal resistance. Ethical considerations are paramount throughout this process, as AI-driven decisions must remain fair and unbiased, particularly when affecting the vulnerable populations these organizations serve. Real-world examples explained in this lesson demonstrate the tangible potential of these tools, such as the League Against Cancer using AI scoring to boost fundraising return rates. Successful implementation, as seen with Fondazione Compagnia di San Paolo, often involves creating centralized data hubs and collaborative working groups to ensure that technology remains aligned with organizational values and community needs. To begin this journey effectively, organizations should conduct a thorough needs analysis, engage in co-creation with beneficiaries and employees, and launch small-scale pilot projects to gather feedback before scaling up. This inclusive and iterative approach ensures that AI serves as a powerful catalyst for social good, effectively bridging the gap between technological innovation and meaningful community impact.

Proprietary Video Materials

The video leverages the SETS project as a case study to exemplify how to develop an impact framework and run continuous monitoring on your organisation's impact results.

Video transcript

Strategic Use of AI in the Social Economy (Slide 1)

Welcome to this session on the strategic use of AI in social economy organizations. In today's lesson, we'll explore how integrating artificial intelligence can significantly optimize key management processes within social economy entities, such as associations, cooperatives, and foundations. By the end of this lesson, you'll understand how to leverage AI tools to automate tasks, make informed decisions, enhance resource use, and provide personalized interactions with stakeholders. Think about how these benefits might apply to your specific organization—whether it's improving relations with stakeholders, serving beneficiaries more efficiently, or enhancing internal management processes. The goal here is to use AI to better serve your mission while ensuring that the principles of fairness, accessibility, and social impact are maintained.

Process Optimization with AI (Slide 2)

AI offers numerous opportunities to streamline internal processes for social economy organizations. For example, AI can optimize fundraising campaigns by analyzing donor data to find the best solicitation strategies, and it can also personalize messages for each donor. AI tools are equally effective in the recruitment and management of volunteers—automating activities like screening resumes or scheduling training sessions. Another area of optimization is budget management, where predictive analysis helps in anticipating financial needs and better utilizing available funds. Imagine how much time and manual effort can be saved when AI takes over these repetitive tasks, allowing human teams to focus on more strategic, creative, or personal aspects of the organization.

Stakeholders and AI Integration (Slide 3)

AI has a role to play in enhancing the experience of different stakeholders within social economy organizations. For instance, beneficiaries benefit from AI-enabled personalization of services, such as receiving recommendations tailored to their specific needs. For public funders and donors, AI provides detailed, accurate impact reports, increasing trust and transparency. Volunteers and employees can experience simpler planning processes and better task allocation, while members and elected officials benefit from improved internal communication and decision-making. When applied thoughtfully, AI can enhance relationships across the board, ensuring that each stakeholder feels valued and engaged. Keep in mind the importance of maintaining ethical standards as you explore these AI capabilities.

Challenges of AI for the Social Economy (Slide 4)

Despite its many advantages, the use of AI also poses challenges, particularly for social economy organizations that often operate with limited financial and human resources. The cost of integrating AI tools can be high, and finding the right skill set within your team to operate these tools is another hurdle. Introducing AI also requires a cultural shift—teams need to be trained and prepared for new working methods, which can sometimes be met with resistance. Ethical considerations are equally important. AI decisions should always be fair, particularly when they affect vulnerable populations. As we proceed, consider how these challenges can be proactively addressed within your context, to maximize benefits while minimizing risks.

Opportunities Offered by AI (Slide 5)

The opportunities AI presents are immense. It can improve fundraising by analyzing donor behaviors to identify the most effective methods of outreach, increasing engagement and conversion rates. In financial and administrative management, AI tools can automate budget processes, minimize human errors, and improve overall efficiency. Another key area is impact measurement—AI helps track and analyze performance metrics in real-time, enabling organizations to adjust their strategies quickly to improve their effectiveness. Imagine how these enhancements could help you demonstrate your social impact more clearly to stakeholders, thereby improving transparency and funding opportunities. As you listen, think about how AI could contribute to the unique opportunities within your organization.

Examples of AI Use in Social Economy (Slide 6)

Let's look at some real-world examples to understand AI's impact. The "League Against Cancer" association utilized an AI-driven scoring system to better identify potential donors. This led to a remarkable improvement in fundraising return rates. Another case is the "King Baudouin Foundation," which used AI and natural language processing (NLP) to categorize activities by themes, optimizing project tracking and better allocating resources to areas of emerging interest. These examples highlight that AI isn't a distant futuristic concept—it's here and being used by organizations just like yours to make a tangible difference. Think about how similar solutions could be applied to your campaigns or internal processes.

Inspiring Best Practices (Slide 7)

Implementing AI effectively goes beyond using the tools—it requires creating a supportive environment. Take the example of the "Fondazione Compagnia di San Paolo," which established a centralized data hub to improve transparency and strengthen trust among stakeholders. Another best practice is the use of collaborative internal working groups dedicated to AI adoption, ensuring that teams are well-trained and understand how AI aligns with the organization's values. Finally, using open data to understand community needs is an effective way to optimize resource allocation. These practices highlight that while AI can be transformative, success lies in integrating it thoughtfully, ethically, and in alignment with the organization's mission.

Pathway to Action (Slide 8)

So, how do you start integrating AI into your organization? First, conduct a needs analysis: identify which of your processes would benefit most from automation. Then, engage in co-creation with your stakeholders: work with beneficiaries, volunteers, and employees to design solutions that address their needs. Start small with pilot projects, gather feedback, and adjust accordingly before scaling up. Remember the example from the “King Baudouin Foundation,” which set up discussion groups with beneficiaries to refine AI’s use in its operations. This kind of inclusive approach ensures that AI not only serves organizational goals but also respects and responds to the community it aims to benefit. Think of these steps as your roadmap to effectively harnessing AI for social good.

Verification of the participant's understanding

Format: Multiple-choice questions

Question 1

What is one of the primary benefits of AI automation for teams within social economy organizations?

- A. Completely replacing the need for human personnel in donor relations.
- B. Allowing teams to focus on more strategic, creative, and personal aspects of their work.
- C. Eliminating the requirement for a clear social mission.
- D. Reducing transparency to speed up decision-making processes.

Question 2

Which organization is cited for using Natural Language Processing (NLP) to categorize activities and optimize project tracking?

- A. The League Against Cancer.
- B. Fondazione Compagnia di San Paolo.
- C. The King Baudouin Foundation.
- D. The SETS project pilot team.

Question 3

According to the "Pathway to Action," what is the recommended first step for integrating AI into an organization?

- A. Conducting a needs analysis to identify which processes would benefit most from automation.
- B. Purchasing the most expensive software available on the market immediately.
- C. Implementing large-scale solutions without any preliminary testing.
- D. Replacing internal working groups with external technology consultants.

Lesson 11

AI tools to support decision making

Expected time effort: 10 min

Main page content

This lesson provides a comprehensive overview of the evolving AI landscape and its essential role in optimizing the work of social economy organizations. As the digital environment accelerates, understanding the various categories of AI tools, ranging from automation and generative AI to predictive analysis, becomes crucial for aligning technological innovation with organizational goals. These tools are broadly divided into automation platforms that streamline repetitive tasks, no-code platforms like ChatGPT that allow for custom solution building without technical expertise, and analytical tools that drive data-informed decision-making.

By integrating features such as automated content generation for personalized reports and marketing, or predictive analysis to transform raw data into actionable insights, organizations can significantly enhance their outreach and service delivery. A key highlight of this technological shift is the synergy between AI and no-code tools, which empowers non-technical staff to develop innovative solutions quickly and cost-effectively. Platforms like Akkio enable smaller organizations to automate complex data analysis, while workflow tools like Zapier connect various applications to reduce the operational burden on human teams. This shift allows staff to focus on higher-value tasks that require empathy and creative problem-solving, which are the heart of the social economy. Furthermore, emerging trends such as running AI locally on personal computers offer affordable alternatives to costly cloud services, while cooperative AI platforms allow organizations to manage resources jointly.

However, the adoption of these tools comes with challenges, including high costs, the need for specialized skills, and concerns regarding algorithmic bias. To navigate these hurdles, organizations must adopt a strategic approach: starting with a clear needs assessment, providing adequate training for managers, and ensuring that ethical governance remains central to every implementation. By launching pilot projects and gathering continuous feedback, social economy organizations can responsibly leverage AI to improve resource optimization and maximize their impact on the communities they serve.

Proprietary Video Materials

The video leverages the SETS project as a case study to exemplify how to develop an impact framework and run continuous monitoring on your organisation's impact results.

Video transcript

Introduction to AI Tools Landscape (Slide 1)

"Welcome to this module on AI tools. In today's fast-paced digital landscape, AI has become essential, offering an expansive range of tools designed to optimize the work of social economy organizations. This lesson will help you explore the various categories and functionalities of AI tools, and how these emerging innovations can support your organization's goals. We'll begin by outlining the key categories of AI tools. These include automation tools that simplify repetitive processes, generative AI for content creation, and predictive analysis tools for anticipating trends and needs. Understanding how to navigate this evolving landscape is crucial for selecting the right tools that align with your organization's objectives. Let's dive in!"

Categories of AI Tools (Slide 2)

"In this section, we'll explore the main categories of AI tools. According to resources like the 'No Code AI Tool Complete Guide,' AI tools for social economy organizations are broadly divided into automation tools, no-code platforms, and analytical tools. Automation tools help streamline tedious, time-consuming tasks, enhancing productivity. No-code platforms, such as ChatGPT, allow you to create custom solutions without needing extensive technical knowledge. Analytical tools assist in making data-driven decisions. By understanding these categories, you can better align your choice of AI tools with the specific needs of your organization, whether it's cost reduction, efficiency improvement, or personalization of services."

Key Features of AI Tools (Slide 3)

"Now, let's look at the specific features of these AI tools. For instance, content generation tools help create personalized reports and marketing campaigns automatically. These are particularly useful for engaging with your audience in a consistent manner. Predictive analysis tools can transform raw data into actionable insights, allowing your organization to make more informed decisions. AI tools also facilitate process automation, saving time by managing routine activities. By incorporating these features into your digital strategy, you can significantly improve your efficiency, outreach, and impact. The goal is to use digital tools effectively to enhance the delivery of services to your beneficiaries."

No-Code Tools and AI (Slide 4)

"Let's explore how no-code tools integrate with AI. The video titled 'Will AI Kill No Code?' discusses the strong synergy between these technologies. No-code AI tools empower people without technical expertise to develop innovative solutions, allowing for greater accessibility, customization, and

speed of deployment. For example, platforms like Akkio allow you to automate data analysis without coding knowledge. This is especially advantageous for smaller social economy organizations that need practical, cost-effective solutions. Using these tools, you can quickly create tailored applications to support your operations, boosting both productivity and agility in your projects."

Automation Tools to Save Time (Slide 5)

"Automation tools are at the heart of making administrative and repetitive tasks more manageable. As mentioned in the article 'Saving Time through Task Automation,' tools like Zapier can connect various applications to automate workflows, while Akkio helps automate data analysis, and email automation tools ensure consistent communication with stakeholders. This means your human resources can focus on higher-value tasks that require empathy and creative problem-solving, which are particularly important in the context of social economy organizations. By leveraging automation, you reduce the operational burden on your team and enhance productivity."

Innovations and Emerging Trends in AI Tools (Slide 6)

"AI is continuously evolving, and new trends are emerging that are making these tools more accessible and powerful. One example from the blog 'Running AI on a Personal Computer' demonstrates that AI can now run locally, enabling smaller organizations to utilize advanced technology without relying on costly cloud services. Other trends include cooperative AI platforms, which allow multiple organizations to jointly manage tools, and the customization of AI models to fit specific needs. Being aware of these trends is essential for social economy organizations, as it enables you to incorporate cutting-edge technologies in an affordable and ethical manner, driving impact while maintaining control over your data."

Challenges and Opportunities for SEO (Slide 7)

"Using AI tools brings both challenges and opportunities. According to the article 'Finance Managers and AI: A Necessary Adaptation,' there are hurdles like high costs, the need for specialized skills, and concerns about algorithmic bias. However, the opportunities are significant, especially when it comes to automating operations and personalizing services. For social economy organizations, it's important to balance these opportunities against the potential risks. Proper training for managers, developing a strong ethical framework, and choosing appropriate AI tools can ensure that your organization effectively leverages AI while mitigating challenges. The focus should be on adopting technology responsibly and using it to enhance social impact."

Summary and Next Steps (Slide 8)

"To wrap up, integrating AI tools can be transformative for social economy organizations, enhancing efficiency and service quality. The key is to be strategic in how you implement these technologies—start by identifying tools that match your specific needs. Train your teams to use no-code and automation tools effectively, and ensure that ethical governance is central to all technological implementations. Next, take steps to identify the areas where AI can bring the most value,

implement pilot projects, and gather feedback to refine your strategy. AI holds immense potential for improving how we serve beneficiaries, optimize resources, and make a greater impact on our communities.

Verification of the participant's understanding

Format: Multiple-choice questions

Question 1

Which category of AI tools is specifically designed to allow users to create custom solutions without requiring extensive technical or coding knowledge?

- A. Predictive analysis tools
- B. Traditional cloud-based databases
- C. No-code platforms
- D. Local hardware servers

Question 2

What is the primary benefit mentioned regarding the emerging trend of running AI on a personal computer?

- A. It eliminates the need for any internet connection
- B. It guarantees that algorithmic bias will be removed
- C. It allows smaller organizations to use advanced technology without costly cloud services
- D. It automatically updates the organization's social mission

Question 3

According to the lesson, how does task automation (using tools like Zapier or email automation) specifically support the human resources of an SEO?

- A. By freeing them to focus on high-value tasks requiring empathy and creativity.
- B. By replacing the need for human stakeholders in the decision-making process.
- C. By automatically generating the organization's annual financial budget.
- D. By ensuring that all volunteers have expert-level coding skills.

Lesson 12

Using AI to help the organizations in grant-seeking and fundraising

Expected time effort: 10 min

Main page content

This lesson explores the transformative role of Artificial Intelligence in grant-seeking and fundraising, offering social economy organizations a suite of tools to enhance capacity through data-driven precision. AI revolutionizes the field by automating opportunity analysis, using predictive algorithms to sift through databases and rank donors based on their likelihood to contribute. This shift from a "one-size-fits-all" approach to targeted donor segmentation allows organizations to direct their efforts where they are most likely to yield results. Beyond strategy, AI addresses the operational burden by automating repetitive administrative tasks, such as updating donor databases, tracking pledges, and sending personalized thank-you notes, thereby freeing staff to focus on high-value relationship building and core mission activities. Furthermore, through social network analysis and social listening, AI provides deep insights into donor motivations and identifies influential supporters who can champion an organization's cause by monitoring relevant conversations across digital platforms. Predictive modeling further enhances this by analyzing historical data to forecast future contributions, ensuring that resources are allocated toward high-potential prospects with the highest likelihood of making a significant impact. Additionally, real-time AI tools evaluate the return on investment (ROI) for various campaigns, allowing for data-backed decisions on whether to invest in digital marketing, events, or donor retention. Ultimately, the power of AI lies in its ability to deeply personalize the donor experience; by analyzing individual patterns and interests, SEOs can deliver tailored messages that strengthen loyalty and increase retention rates. To capitalize on these benefits, organizations should begin by integrating predictive tools into existing workflows, training teams on AI capabilities, and maintaining a strict ethical framework for managing donor data, ensuring that technology serves as a bridge to deeper human connection and sustained social impact.

Proprietary Video Materials

The video leverages the SETS project as a case study to exemplify how to develop an impact framework and run continuous monitoring on your organisation's impact results.

Video transcript

Introduction to AI in Grant-Seeking (Slide 1)

"Welcome to our session on how AI can revolutionize grant-seeking and fundraising for social economy organizations. Artificial Intelligence offers a powerful set of tools to enhance your fundraising capacity, helping you find the right opportunities, personalize your approach, and improve campaign efficiency. Imagine a world where identifying the best grant opportunities becomes an automated process and personalization of your donor communications is done with precision, all driven by AI. By the end of this session, you will have a better understanding of how AI can assist in analyzing trends, identifying potential donors, and tracking your fundraising impact effectively. Let's dive in and explore the strategic use of AI for grant-seeking and fundraising."

Opportunity Analysis with AI (Slide 2)

"One of the core benefits of AI in fundraising is opportunity analysis. AI tools can sift through existing databases to pinpoint potential grant opportunities and rank donors by their likelihood to donate. Using predictive algorithms, AI helps you focus your efforts where they matter most. For instance, the Fidelis report highlights AI's capabilities to segment donors and customize campaigns to their preferences. This segmentation helps classify donors according to their potential contribution, allowing you to reach out more effectively. With AI-driven donor segmentation, your organization can move from a one-size-fits-all approach to a targeted, data-driven outreach strategy that enhances donor engagement."

Automating Administrative Tasks (Slide 3)

"Fundraising often involves repetitive and administrative tasks that take away valuable time from core fundraising efforts. AI can automate these tasks, such as updating donor databases, sending thank-you notes, or tracking pledges. This automation frees up your team to focus on higher-value activities like building relationships with donors. Imagine automating personalized thank-you notes after each donation or setting automatic reminders for incomplete pledges. AI is the key to making these repetitive but necessary tasks happen seamlessly, ultimately allowing your team to concentrate on activities that drive real impact. These tools can save both time and money, helping you maximize your resources."

AI for Social Network Analysis (Slide 4)

"AI's capability for social network analysis can also be leveraged to better understand your donor audience and their motivations. With AI-driven social listening tools, you can monitor conversations related to your organization's themes and identify influential supporters. According to the C9 Social Listening and AI Marketing report, these tools can give insights into which audiences are most likely to engage and what motivates them. This helps you refine your outreach strategy and direct your efforts to engage influencers who can champion your cause. AI-based network analysis not only tells you who is talking about your cause but also reveals how to most effectively join those conversations."

Predictive Donation Analysis (Slide 5)

"Another powerful application of AI in fundraising is predictive donation analysis. By analyzing historical data, AI can predict which individuals are most likely to donate and how much they might contribute. According to the Data Philanthropy in Foundations report, predictive models can analyze donor history to forecast future contributions, helping you focus on high-potential donors. This enables organizations to allocate their fundraising resources more effectively, ensuring that each effort is directed toward prospects that have the highest likelihood of making a significant contribution. AI helps you put your time, effort, and money where they will have the greatest impact."

Optimizing Fundraising Investments (Slide 6)

"AI can also be used for optimizing where and how to invest in fundraising efforts. By analyzing data in real-time, AI tools can help determine which campaigns are providing the best return on investment. This ensures that your funds are utilized efficiently, whether it's for launching digital marketing campaigns, hosting fundraising events, or retaining existing donors. According to the AI for Investment Allocation report, AI can evaluate the cost-benefit analysis of various campaigns, enabling you to make informed decisions on resource allocation. The result is an overall optimized approach to fundraising, where every dollar spent is backed by data-driven insights."

Personalizing Donor Experience with AI (Slide 7)

"Long-term donor engagement relies heavily on personalization. AI enables CEOs to send tailored messages, create customized thank-you campaigns, and maintain donor loyalty by analyzing individual donation patterns. The Charity Digital report on AI in fundraising underlines the importance of personalizing the donor experience. With AI, you can send highly specific messages based on each donor's history, interests, and engagement patterns. Personalized experiences strengthen donor loyalty and lead to higher retention rates. Imagine every donor receiving communication that truly resonates with them—AI makes this possible, helping to deepen the connection between your organisation and its supporters."

Summary and Next Steps (Slide 8)

"In summary, AI holds significant potential to enhance your grant-seeking and fundraising efforts by increasing efficiency, improving personalization, and optimizing resource allocation. AI can help you analyze trends, automate repetitive tasks, engage donors in a meaningful way, and identify high-potential opportunities—all while freeing up your team's time to focus on strategy and human connections. As you move forward, consider integrating predictive tools into your current processes, train your teams on available AI tools, and always adopt an ethical approach when handling donor data. These steps will ensure that your organization maximizes its fundraising potential and builds lasting relationships with your supporters."

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary purpose of an Impact Monitoring Framework?

- A. It replaces the need for any direct contact with donors.
- B. It focuses solely on finding new donors while ignoring existing ones.
- C. It allows organizations to move from a "one-size-fits-all" approach to a targeted, data-driven strategy based on donor preferences.
- D. It automatically increases the amount of every donation by 10%.

Question 2

According to the lesson, what is the primary organizational benefit of using AI to automate administrative tasks like sending thank-you notes?

- A. It frees up the team to concentrate on high-value activities and building human relationships.
- B. It eliminates the need for an ethical framework regarding donor data.
- C. It ensures that the organization no longer needs to analyze its social impact.
- D. It allows the organization to stop tracking donor history altogether.

Question 3

What is the specific purpose of "Social Listening" tools in the context of AI-based network analysis?

- A. To record private phone conversations with potential grant-makers.
- B. To monitor public conversations and identify influential supporters who can champion the cause.
- C. To automate the writing of legal contracts for public-private partnerships.
- D. To predict the exact date of the next global economic shift.

Lesson 13

AI tools to automate tasks

Expected time effort: 10 min

Main page content

This lesson focuses on the practical application of AI-driven automation to streamline workflows within social economy organizations. The primary goal of automation is to transform routine, repetitive activities into efficient processes, thereby reducing human error and freeing up staff to focus on high-value work that requires creativity, empathy, and strategic insight. Automation tools are generally categorized by their function: workflow integrators like Zapier or Integromat link different software to create seamless task flows; engagement tools like AI-driven chatbots provide immediate assistance to stakeholders; and communication platforms like Mailchimp automate email marketing and donor outreach. By implementing these technologies, tasks such as data entry, meeting scheduling, and social media posting can be handled automatically and consistently.

To successfully implement automation, organizations should adopt an incremental, step-by-step approach. This involves identifying frequently repeated tasks, mapping out the necessary steps, and selecting a specific process for a pilot test—such as automating thank-you emails triggered by new donations. While the benefits of "hyper-automation" (the combination of AI and machine learning across all operations) are becoming more accessible to non-profits, organizations must remain vigilant regarding challenges. Key considerations include ensuring that tools integrate well with existing systems, maintaining strict data security standards (such as GDPR compliance), and managing the cultural shift through team training. By strategically applying these tools to complex scenarios, such as multi-channel campaign management, SEOs can build a robust operational strategy that maximizes both efficiency and social impact.

Proprietary Video Materials

The video leverages the SETS project as a case study to exemplify how to develop an impact framework and run continuous monitoring on your organisation's impact results.

Video transcript

Introduction to AI and Automation for SEOs (Slide 1)

“Welcome to this module on using AI tools to automate tasks within social economy organizations (SEOs). Today, we will explore how artificial intelligence can streamline various processes, helping your organization save time and improve efficiency. By the end of this session, you’ll have a clear understanding of how to incorporate AI automation to enhance your workflows, allowing your team to focus more on meaningful work rather than repetitive, time-consuming tasks. We’ll be discussing several categories of AI tools, their functionalities, and how they can transform routine activities into more manageable and efficient workflows.”

The Benefits of Automation for SEOs (Slide 2)

“AI-driven automation is revolutionizing how social economy organizations operate, particularly in managing repetitive tasks that often drain valuable time and resources. Automation benefits include reducing human error, ensuring consistency in operations, and freeing up staff to concentrate on activities that require creativity and human insight. Consider the tasks your organization performs repeatedly: sending newsletters, data entry, scheduling meetings, and customer interactions. By implementing AI tools, such tasks can be handled swiftly and efficiently, maximizing productivity while maintaining high-quality outcomes. We’ll go over some examples to see how automation can directly apply to your organization.”

Categories of AI Tools for Automation (Slide 3)

“AI tools come in various categories, each designed to handle specific functions. Today, we will focus on tools for customer relationship management, email marketing, workflow automation, and data analysis. Workflow automation tools, like Zapier or Integromat, link different software to create a seamless task flow. These tools can automate tasks, such as adding contacts from emails to CRM or creating calendar invites. Tools like Chatbots help with customer engagement, offering immediate assistance to users, while email marketing automation tools, like Mailchimp, ensure you stay connected with stakeholders effortlessly. Each of these categories is tailored to automate the redundant tasks in your organization, allowing you to allocate resources effectively.”

Practical Examples of Automation Tools in Action (Slide 4)

“Let’s look at some specific AI tools and how they can be implemented. Imagine you are managing multiple communications platforms—social media, email, and more. By using a tool like Hootsuite or Buffer, you can automate your social media postings, ensuring consistency and optimal timing, without manually logging in every day. For internal communication, AI assistants like Slack’s integration with workflows can reduce time spent on scheduling meetings or sharing documents. Tools like Trello with AI-based task assignment features can help automate your project

management tasks, ensuring the right people are notified about upcoming deadlines and project updates.”

Step-by-Step Implementation (Slide 5)

“To get started, identify tasks that are repeated frequently within your organization. For example, do you frequently send thank-you emails to donors? Automate this using a tool like Mailchimp, which can send personalized emails based on triggers, such as a new donation. Start with one process—map out the steps involved, identify areas for automation, and then use tools like Zapier to connect the necessary software. This incremental approach allows for testing the efficiency gains from automation and adapting based on results. Remember, starting small helps in understanding the impact of automation before scaling it across the organization.”

Challenges and Considerations (Slide 6)

“While AI can significantly enhance automation, there are challenges you must consider. The key is choosing the right tool for the right task. Not every tool will suit your organization's particular workflows or integrate well with your current systems. Data security is also crucial—ensure that any automated tool complies with data protection standards, particularly GDPR if you are handling personal information. Another challenge is change management; teams may need training to adapt to new workflows involving automation tools. It's essential to create a structured plan for the adoption and ongoing support of these tools to ensure their effectiveness.”

Emerging Trends in AI Automation (Slide 7)

“The landscape of AI automation tools is continually evolving. Emerging trends include more sophisticated chatbot capabilities, like ChatGPT's customizable versions that allow deeper integration with CRM systems. There's also a growing trend toward hyper-automation, which combines AI, machine learning, and automation to cover as many business operations as possible. These tools are becoming more accessible for non-profit and social economy organizations, allowing them to benefit from technologies previously only available to larger enterprises. Staying updated on these trends can help your organization leverage automation more effectively as new innovations emerge.”

Verification of the participant's understanding

Format: **Scenario**

Now, let's put your knowledge into practice through a scenario. Imagine your organisation has just launched a new campaign and needs to engage stakeholders across various channels—email, social media, and direct contact. Using what you have learned today, identify which AI tools you would use for each platform, how they would interact, and what the overall automated workflow would look like. What processes would you prioritize for automation, and how would these choices impact your overall efficiency? This scenario will help you apply the concepts we discussed today and illustrate how AI tools can be an integral part of your operational strategy.

Communication and collaboration in digital environments

Overview

Course description and aim

The course aims to enhance participants' skills in effective communication and collaboration within digital workspaces. It covers tools and strategies for remote teamwork, digital communication platforms, and best practices for maintaining productivity and engagement in a digital environment. Participants will learn how to overcome common challenges associated with virtual collaboration, such as maintaining clear communication and building team cohesion. The course also emphasizes the importance of creating inclusive digital spaces that accommodate diverse work styles and needs.

Skills gap area

The course is designed to equip **SEOs, employees, and job seekers** with an overview of the main tools and concepts related to collaboration and communication in digital environments.

This is consistent with the following DIGCOMP areas:

- DIGCOMP - 2.1 (Interacting through digital technologies)
- DIGCOMP - 2.2 (Sharing through digital technologies)
- DIGCOMP - 2.4 (Collaborating through digital technologies)
- DIGCOMP - 3.1 (Developing digital content)

- DIGCOMP – 3.2 (Integrating and re-elaborating digital content)

Modules

The course includes the following modules:

1. Websites

This module helps SEOs employees understand how to effectively manage and use their websites to collect valuable data, build an online presence, and showcase their products or services in online settings. These skills are critical for SEOs, as a well-structured online presence enables them to communicate their social impact to a broader audience. Few lessons address user experience and biases, which are vital for ensuring that websites are accessible and engaging for all users while avoiding unintentional exclusions. Finally, the module covers the processes for keeping websites up to date and for effectively showcasing and selling products or services. These lessons are essential for SEOs to remain competitive, reach a wider audience, and ensure that their social value is clearly communicated online.

2. Digital marketing using social media

This module equips SEO staff with the essential skills to use digital marketing tools and social media platforms effectively. The first two lessons introduce core digital marketing concepts and guide participants in selecting the most appropriate platforms for their target audiences, ensuring that organizational messages reach the right communities. Subsequent lessons focus on developing an editorial plan, emphasizing the importance of structured content creation and consistent communication across platforms. The module then explores paid advertising strategies and target audience definition, highlighting their role in optimizing engagement and improving the effectiveness of marketing initiatives. In addition, the course addresses GDPR compliance and the ethical use of data, which are particularly critical for SEOs in fostering transparency and trust among

audiences that often include disadvantaged groups. Overall, the module supports SEOs in enhancing visibility while maintaining responsible, mission-driven digital marketing practices.

3. Collaborating in digital environments

This module introduces the tools and best practices that SEOs staff need to collaborate effectively in digital environments, particularly in hybrid and remote work settings. The initial lessons present agile project management and digital communication tools, which are essential for coordinating tasks, managing projects, and sustaining efficient workflows. The module then addresses inclusion in digital projects, emphasizing the importance of engaging all team members and valuing diverse perspectives in line with SEO's commitment to social inclusion. Subsequent lessons focus on digital wellbeing, highlighting strategies for maintaining a healthy work-life balance in an increasingly connected workplace. The module also explores the use of visual boards, cloud-based collaboration platforms, and mailing list tools to support clear communication and effective project management. Overall, the module equips SEO employees with practical skills to collaborate smoothly and confidently in a digital workplace.

Modules' content

The course includes **3 modules** and **19 lessons**.

1. Websites

The module includes the following lessons:

1. *Collect data through your website*
2. *Build an online presence*
3. *Sustain an inclusive and bias-free user experience*
4. *Keep your website up to date*
5. *Build a purpose-driven brand*

2. Digital marketing using social media

The module includes the following lessons:

6. Build your social media marketing strategy
7. Choose the right platform
8. Create an editorial plan
9. Exploit Paid Social Media Advertising
10. Define your target audience
11. Understand key GDPR requirements for digital marketing
12. Ethical use of data and information

3. Collaborating in digital environments

The module includes the following lessons:

13. Agile project management approaches and tools
14. Manage communication digitally
15. Create an inclusive and accessible digital environment
16. Promote digital well-being in the workplace
17. Empower your team with visual collaboration tools
18. Manage a transition to cloud working
19. Mailing list and calendar integration

Websites

The module includes the following lessons:

1. *Collect data through your website*
2. *Build an online presence*
3. *Sustain an inclusive and bias-free user experience*
4. *Keep your website up to date*
5. *Build a purpose-driven brand*

Lesson 1

Collect Data through your website

Expected reading time: 22 minutes

Main page content

In today's interconnected digital landscape, websites transcend their traditional role as mere online presences. For Social Economy Organizations (SEOs), a website is a dynamic and indispensable nexus for understanding stakeholders, refining service delivery, and making informed decisions that amplify their societal impact. Through carefully designed forms, sophisticated analytics, and strategic user interactions, SEOs can glean invaluable insights into visitor behavior, preferences, and evolving needs. This data, when collected and utilized ethically, becomes the bedrock for optimizing services, personalizing communication, and underpinning robust strategic planning, all while fostering unwavering trust with their communities.

This lesson delves into the pivotal methods of website-based data collection, explores the multifaceted benefits these approaches offer, and outlines best practices to ensure both efficiency and stringent compliance with evolving data privacy regulations.

To begin understanding the importance of a well-designed website for data collection, this video offers an overview of how to create top-tier websites. While it focuses on general design, the principles of intuitive user interface and clear navigation discussed in the video are fundamental to encouraging users to interact with forms, surveys, and other data collection functionalities. A well-structured website is the first step in ensuring data can be collected efficiently and effectively, enhancing the overall user experience and their willingness to share information: [Video Link: The Easy Way to Design Top Tier Websites](#)

The Imperative of Data for Social Economy Organizations

Data collection for SEOs isn't only about maximizing sales: it's also about maximizing social good. Understanding who benefits from their services, what challenges their beneficiaries face, and how effectively their programs are addressing these needs is paramount. For instance, data can reveal which community outreach programs are most effective, identify underserved demographics, or highlight areas where resources are being underutilized. This emphasis on data-driven social impact aligns with the broader push towards evidence-

based policy-making and accountability within the non-profit and social enterprise sectors. Organizations like the European Commission actively promote the use of data for social innovation and impact measurement, as evidenced in their support for initiatives aimed at strengthening the social economy ecosystem.

Effective data collection through websites offers a multitude of tangible benefits that directly contribute to the mission and sustainability of SEOs:

- **Enhanced Decision-Making:** Access to real-time insights empowers SEOs to make agile, data-driven strategic choices, ensuring resources are allocated effectively towards achieving their social objectives. This moves beyond anecdotal evidence to verifiable impact.
- **Cost Efficiency:** Automating the data collection process significantly reduces manual labor, saving valuable time and financial resources that can be redirected to core programs and services.
- **Improved User Engagement and Personalization:** Data enables SEOs to create highly personalized experiences for their stakeholders – from tailored communications to relevant service recommendations. This fosters deeper connections, strengthens relationships, and enhances the overall user journey, leading to increased loyalty and participation.
- **Transparency and Accountability:** Clearly communicating data usage policies and demonstrating how data contributes to positive social outcomes builds profound trust with stakeholders, donors, and the wider community. This commitment to ethical data stewardship enhances the organization's credibility.
- **Streamlined Operations:** Centralizing collected information into a unified database or CRM system streamlines internal processes, supports robust analytics, and facilitates comprehensive reporting to funders and regulatory bodies.

The logo for Kiva, featuring the word 'kiva' in a lowercase, green, sans-serif font.

Kiva, a non-profit organization that allows people to lend money via the Internet to low-income entrepreneurs and students in over 70 countries, is a prime example of a social enterprise using its website not just for fundraising but also for demonstrating impact through data. While their core function is facilitating loans, their website's analytics play a critical role in understanding lender behavior and the visibility of their impact. Kiva's data-driven approach, heavily reliant on website analytics, allows them to continuously refine their platform, optimize the lending experience, and effectively communicate the tangible impact of microloans to their global community of lenders. The company does this by, for example:

- *Tracking down how lenders interact with different borrower profiles, filtering options, and donation pages.* They analyze clicks, time on page, and conversion rates to optimize the user journey, encouraging more loans to be made and diversified across different regions or sectors.
- *Using analytics to monitor engagement with their "Stories" section, which showcases the impact of loans.* This includes tracking views on borrower update pages, shares of impact stories on social media, and clicks on calls to action to fund more loans. This helps them understand which narratives resonate most with lenders.
- *Tracking down other relevant KPIs* such as the average number of loans per lender, the speed at which loans are funded, and the geographic distribution of lending. These insights, derived from website data, help them refine their platform and outreach strategies to maximize their social impact.

Website – based data collection methods

SEOs can leverage a variety of highly effective and accessible methods to collect crucial data through their websites, each offering unique insights:

1. Forms and Surveys: Direct Insights from Stakeholders

Forms and surveys are fundamental tools for direct data acquisition, allowing SEOs to gather explicit information from their website visitors and beneficiaries.

- **Contact Forms:** These are essential for gathering visitor details and specific inquiries, enabling tailored follow-ups. For SEOs, this could mean understanding specific needs for assistance, volunteer inquiries, or partnership opportunities.

- Tip: Incorporate drop-down menus or checkboxes for standardized responses. This not only streamlines the user experience but also facilitates easier data analysis, allowing for quick aggregation of common inquiries or demographic information.
- Feedback Surveys: Directly embedded on your website, these surveys capture user opinions and satisfaction levels. This is vital for SEOs to assess the effectiveness of their services, identify areas for improvement, and gauge community sentiment.
 - Tip: Employ conditional logic within surveys. This allows for dynamic question progression based on previous responses, ensuring that follow-up questions are highly relevant and increase the depth and quality of collected data without overwhelming the user. For example, if a user expresses dissatisfaction with a particular service, subsequent questions can delve into the specific reasons for their discontent.

2. Newsletter Sign-Up: Cultivating Ongoing Engagement

Encouraging visitors to subscribe to newsletters or updates provides SEOs with a continuous channel for engagement, disseminating information about initiatives, impact stories, and upcoming events.

- Tip: Clearly articulate a compelling value proposition. This could include exclusive content (e.g., in-depth reports on social impact), early notifications for events, or opportunities to get involved. A strong value proposition significantly boosts subscription rates, transforming casual visitors into engaged supporters.

3. Event Registrations: Streamlining Participation and Planning

Collecting participant information through online registrations for workshops, webinars, or community events is crucial for planning, logistics, and follow-up.

- Tip: Design registration forms to allow participants to indicate preferences or special needs. For an SEO organizing a community meal, this could involve dietary restrictions; for a workshop, it might be accessibility requirements. This personalization enhances the participant experience and demonstrates the organization's commitment to inclusivity.

4. Web Analytics: Unveiling User Behavior Patterns

Tools like Google Analytics are indispensable for gaining deeper insights into user behavior on your website, including page views, time spent on specific pages, and navigation paths. This type of passive data collection provides valuable insights into how users interact with your site without requiring explicit input, as described by sources on website data collection methods.

- Tip: Set up custom tracking for specific goals. For SEOs, this could include tracking downloads of impact reports, clicks on "Volunteer Now" CTAs, or completion of specific application forms. These custom metrics provide a more granular understanding of user intent and engagement with key organizational objectives.

5. Behavioral Tracking and Cookies: Enhancing User Experience (with Consent)

Monitoring user actions like clicks, time on page, and scroll depth can provide rich qualitative data for refining user experiences. Crucially, this must always be conducted with explicit user consent, in compliance with regulations like GDPR.

- Tip: Implement cookie segmentation. This allows SEOs to differentiate between first-time visitors and returning users, enabling the delivery of tailored content or calls to action. For example, a returning volunteer might see different content than a new visitor exploring the organization for the first time.

6. User Account Registrations: Personalizing the Journey

Allowing users to create accounts on your website enables SEOs to personalize content, track individual engagement over time, and offer exclusive resources.

- Tip: Offer social media login options (e.g., Google, Facebook). This significantly simplifies the registration process by leveraging existing user credentials, reducing friction and minimizing registration abandonment rates.

Challenges and Solutions in Website-Based Data Collection for SEOs

While the benefits are substantial, SEOs must navigate several challenges inherent in website-based data collection. Proactive strategies are key to overcoming these hurdles:

Challenge: Low Submission Rates on Forms

- Solution 1: Simplify Forms and Optimize User Experience: Long, complex forms are a major deterrent. SEOs should ruthlessly prune forms, reducing the number of required fields to the absolute minimum. Employ clear, concise language and intuitive design. A streamlined user experience encourages completion.
- Solution 2: Offer Meaningful Incentives: Providing a clear incentive can significantly boost submission rates. For SEOs, this could be access to exclusive resources (e.g., a toolkit for social entrepreneurs), entry into a relevant giveaway (e.g., a free workshop slot), or a downloadable impact report. The incentive should align with the user's interests and the organization's mission.

Challenge: Data Privacy Concerns and Compliance

- **Solution 1: Transparent Data Usage Policies:** A dedicated, easily accessible privacy policy page is non-negotiable. It must clearly explain what data is collected, how it is used, who it is shared with (if anyone), and users' rights regarding their data (e.g., right to access, rectification, erasure). Compliance with regulations like the General Data Protection Regulation (GDPR) in the EU or similar regional frameworks is paramount. The European Union Agency for Cybersecurity (ENISA) provides extensive guidance on data protection in practice.
- **Solution 2: Robust Security Measures:** Employ secure servers (HTTPS), data encryption for data in transit and at rest, and regular security audits. Building trust requires demonstrating a proactive commitment to protecting user data from breaches and unauthorized access. Regularly reviewing security protocols is crucial as cyber threats evolve.

Challenge: High Abandonment Rates on Forms

- **Solution 1: Progress Indicators and Save-and-Resume Features:** For longer forms, particularly those for complex applications (e.g., grant applications, beneficiary intake forms), visual progress indicators (e.g., "Step 2 of 5") keep users engaged. A "save and resume" feature allows users to complete forms at their convenience, significantly reducing abandonment.
- **Solution 2: Optimize Loading Speeds and Mobile Responsiveness:** Slow loading times and non-mobile-friendly designs are immediate turn-offs. SEOs must ensure their websites are optimized for speed across all devices and provide a seamless, responsive experience on smartphones and tablets, where a significant portion of web traffic originates.

Challenge: Inefficient Data Organization and Siloing

- **Solution 1: Integrate with Centralized Systems:** Implement tools that integrate collected website data directly into a centralized Customer Relationship Management (CRM) system or dedicated database. This eliminates manual data entry, reduces errors, and ensures that all stakeholder information is readily accessible and unified for analysis and outreach. Many CRMs offer specific features for non-profits.
- **Solution 2: Automate Categorization and Tagging:** Leverage automation tools to categorize and tag collected data based on predefined criteria. This reduces manual processing time, ensures data consistency, and makes it easier to query and analyze specific segments of information.

Challenge: User Resistance to Behavioral Tracking

- Solution 1: Implement Clear Cookie Consent Banners: A well-designed cookie consent banner is crucial. It must clearly inform users about the use of cookies and provide them with granular control over their data preferences, allowing them to accept all, reject all, or customize their settings. This adheres to privacy-by-design principles.
- Solution 2: Focus on Anonymized and Aggregated Tracking: Where possible, prioritize anonymized tracking that does not identify individual users. Focus on gathering aggregated insights into user patterns and trends rather than individual-level behavior, which can alleviate privacy concerns while still providing actionable data for website optimization. The National Institute of Standards and Technology (NIST) provides frameworks for privacy engineering that can guide these practices.



Problematic Data Collection – The Pitfalls of Over-Collection

The Italian Red Cross (Croce Rossa Italiana) faced scrutiny and a fine from the Italian Data Protection Authority in 2020 related to its data processing practices. The specific case involved the processing of personal data, including sensitive health data, collected through various means (not exclusively websites) and the need for clearer legal bases for processing, as well as more transparent information notices for data subjects. This example highlights the broad challenge of ensuring that all data collection, regardless of the method, adheres strictly to privacy regulations like GDPR, emphasizing the need for data minimization (collecting only what's necessary) and clear purpose specification. Over-collection or unclear purposes for data can lead to significant trust issues and legal penalties.

The core problem, even if not solely website-based, lies in the collection and processing of personal data without fully meeting the transparency and legal basis requirements of GDPR. For a revered organization like the Red Cross, issues with data handling can erode public trust, which is paramount to its mission. When applied to website forms, this translates to demanding excessive personal information without clearly explaining *why* it's needed or how it will be used, leading to user distrust and potential non-compliance.

Conclusion

In summary, the strategic integration of website-based data collection is a transformative asset for Social Economy Organizations (SEOs). Moving beyond a mere online presence, websites become dynamic tools for gaining direct and indirect insights into stakeholder behavior, preferences, and needs. By adopting ethical and compliant data collection methodologies, SEOs can not only optimize their services and enhance engagement but also reinforce transparency and trust. The ability to make data-driven decisions, streamline operations, and demonstrate tangible impact is pivotal for the sustainability and growth of the social economy sector in today's digital landscape.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Coresignal Blog: Website Data Collection: <https://coresignal.com/blog/website-data-collection/#:~:text=Website%20data%20collection%20is%20the,the%20website's%20anti%2Dscraping%20mechanisms>. Accessed on July 29, 2025
2. European Commission: The social economy: https://single-market-economy.ec.europa.eu/social-economy_en Accessed on July 29, 2025
3. Garante per la Protezione dei Dati Personali: Provvedimento del 12 febbraio 2020: <https://www.garanteprivacy.it/web/guest/home/docweb/-/docweb-display/docweb/9284241> Accessed on July 29, 2025
4. Kiva's About Us/Impact Section: <https://www.kiva.org/about/where-kiva-works/impact> Accessed on July 29, 2025
5. Médecins Sans Frontières Careers Page: <https://www.doctorswithoutborders.org/careers> Accessed on July 29, 2025
6. National Institute of Standards and Technology (NIST): Privacy Framework: A Tool for Improving Privacy Through Enterprise Risk Management: <https://www.nist.gov/privacy-framework> Accessed on July 29, 2025
7. Pew Research Center: Americans and Privacy: Concerned, Confused and Feeling Lack of Control Over Their Personal Information: <https://www.pewresearch.org/internet/2019/11/15/americans-and-privacy-concerned-confused-and-feeling-lack-of-control-over-their-personal-information/> Accessed on July 29, 2025
8. Salesforce: Non-profit Cloud: <https://www.salesforce.org/solutions/nonprofit/> Accessed on July 29, 2025
9. The European Union Agency for Cybersecurity (ENISA): Data Protection in Practice: <https://www.enisa.europa.eu/topics/data-protection> Accessed on July 29, 2025

Verification of the participant's understanding

Format: Multiple-choice questions

Question 1

Which of the following is NOT primarily a direct data collection method from a website visitor, requiring explicit user input?

- a) Feedback Surveys
- b) Newsletter Sign-Up
- c) Web Analytics (e.g., Google Analytics)
- d) Event Registrations

Question 2

A Social Economy Organization notices a high abandonment rate on their online volunteer application form. Which of the following solutions would be MOST effective in addressing this specific challenge, while maintaining a positive user experience?

- a) Adding more optional fields to gather richer data about their skills.
- b) Implementing a "save and resume" feature for the form, and ensuring mobile-friendly design.
- c) Removing their privacy policy from the form page to reduce distractions.
- d) Requiring all users to call a phone number to complete the application.

Question 3

Why is it particularly important for Social Economy Organizations (SEOs) to maintain high transparency regarding their data collection practices, especially concerning sensitive data?

- a) To increase advertising revenue from data sales to third parties.
- b) To comply with regulations strictly applicable only to for-profit commercial organizations.
- c) To build and maintain trust with stakeholders and beneficiaries, which is crucial for their social mission and compliance with regulations like GDPR.
- d) To minimize the need for any data security measures, as transparency replaces it.

Lesson 2

Building an online presence

Expected reading time: 15 minutes

Main page content

In the digital age, an organization's online presence is its virtual storefront and a powerful amplifier for its mission. For Social Economy Organizations (SEOs) building a robust online footprint is not just beneficial, it's essential for connecting with stakeholders, demonstrating impact, and mobilizing support.

An effective online presence extends far beyond simply having a website. It involves strategically leveraging multiple digital platforms to forge a cohesive, engaging, and impactful identity. This lesson delves into the fundamental components, strategic approaches, and indispensable tools required to build and sustain a formidable online presence that directly supports the overarching goals of SEOs.

To fully grasp the digital landscape and the importance of a strategic online presence, it's crucial to start with the fundamentals. This introductory video offers a clear and concise overview of what it means to build an effective digital presence, outlining the essential first steps for any organization. It's an excellent starting point to visualize the concepts that will be explored in depth throughout this lesson, providing a practical and visual context to the importance of being visible and accessible in the online world.

Watch it to gain an initial understanding of the key elements we will delve into together:
https://www.youtube.com/watch?v=MYE6T_gd7H0

What are the core Components of a Strong Online Presence?

Website

A well-designed, mobile-responsive website serves as the bedrock of your online presence. It's often the first point of contact for potential beneficiaries, donors, volunteers, and partners. For SEOs, your website should not only inform but also inspire action and clearly articulate your social mission.

What are a website's key elements?

- Ensure your website features clear navigation, compelling visuals, and essential sections such as "About Us" (detailing your mission and values), "Our Impact" (showcasing tangible outcomes and success stories), "Get Involved" (outlining volunteer opportunities, donation pathways, or advocacy calls), and a blog or news section to share updates and insights.
- Beyond aesthetics, focus on user experience. A website should be intuitive, easy to navigate, and accessible to all users, including those with disabilities. Adhering to Web Content Accessibility Guidelines (WCAG) is crucial, ensuring inclusivity aligns with the values of SEOs. The European Accessibility Act (Directive (EU) 2019/882) underscores the legal and ethical imperative for digital accessibility within the EU, impacting many organizations' online offerings. This directive aims to improve the functioning of the internal market by removing barriers created by divergent accessibility requirements, including for websites and mobile applications.

What tools are essential to master?

- Platforms like:
 - WordPress (highly customizable with extensive plugin support, ideal for scaling),
 - Wix (user-friendly drag-and-drop interface, good for beginners),
 - Squarespace (design-focused, great for visual storytelling) offers varying degrees of flexibility and ease of use.
- Google Analytics is indispensable for tracking visitor behavior, traffic sources, popular pages, and conversion rates (e.g., newsletter sign-ups, donations).
 - Tools like Hotjar provide deeper insights through heatmaps, session recordings, and surveys, helping you understand why users behave the way they do and identify areas for improvement.

Social Media Platforms

Social media platforms are vital for direct engagement, fostering community, and amplifying your message in real-time. The choice of platform should align with your target audience and organizational objectives.

What are the most famous platforms to focus on?

- Facebook: Ideal for community building, event promotion, and reaching a broad demographic. Many SEOs use Facebook Groups to foster engaged communities around specific causes.
- Instagram: Visually driven, excellent for showcasing impact through images and short videos. Perfect for human interest stories and behind-the-scenes glimpses of your work.
- LinkedIn: Essential for professional networking, attracting talent, engaging with corporate partners, and thought leadership.
- X (formerly Twitter): Best for real-time updates, news dissemination, and participating in public discourse.
- TikTok: Increasingly relevant for reaching younger demographics and telling impactful stories through short, engaging video content.

What tools can help me in working with these platforms?

- Hootsuite and Buffer allow you to schedule posts across multiple platforms, monitor mentions, and track performance. Later is particularly strong for visual content scheduling on Instagram.
- Canva empowers non-designers to create professional-looking graphics, videos, and presentations quickly, maintaining brand consistency across all platforms.



The logo for the Malala Fund features the word "MALALA" in large, bold, sans-serif capital letters. The letters are colored: 'M' is dark blue, 'A' is orange, 'L' is dark blue, 'A' is orange, 'L' is dark blue, and 'A' is gold. To the right of the 'A' is a small dark blue icon of a crossed hammer and sickle. Below "MALALA" is the word "FUND" in dark blue, bold, sans-serif capital letters.

The Malala Fund, an international non-profit advocating for girls' education, effectively uses its online presence to drive advocacy and fundraising.

Their website, [Malala.org](https://malala.org), is highly visual, featuring compelling stories of girls whose lives have been impacted. Their "Impact" section is prominently displayed with statistics and narratives.

They leverage Instagram (@malalafund) for powerful photo and video storytelling, sharing updates from their work in various countries and highlighting the voices of girls.

Their X (Twitter) presence (@MalalaFund) is used for real-time advocacy, sharing news, and engaging with policymakers and media. They also use email marketing to send out calls to action and updates.

This multi-platform, story-driven approach keeps their mission at the forefront, inspiring global support and direct action. They consistently share real-world progress and challenges.

Search Engine Optimization (SEO)

Optimizing your website and content for search engines is critical to increasing your visibility and ensuring potential supporters can find you when searching for relevant causes or services. You can do it by:

- **Keyword Research:** Identify keywords and phrases your target audience uses when searching for information related to your mission. For an SEO focused on environmental sustainability, this might include "climate action volunteer," "sustainable community projects," or "eco-friendly initiatives [your city]."
- **On-Page SEO:** Optimize page titles, meta descriptions, headers, and content with relevant keywords. Ensure your website loads quickly and is mobile-friendly, as these are significant ranking factors for Google.
- **Off-Page SEO:** Build high-quality backlinks from reputable websites (e.g., news outlets, academic institutions, partner organizations). This signals to search engines that your site is a credible source of information.

What Tools are essential to master?

- Yoast SEO is a widely used plugin for WordPress that helps with on-page SEO, sitemap generation, and content analysis.
- SEMrush and Ahrefs offer extensive tools for keyword research, competitor analysis, backlink auditing, and site health checks.
- Google Search Console provides insights into how Google views your site, including indexing status, search queries, and crawl errors.

Content Marketing: Informing and Inspiring Action

Creating and sharing valuable, relevant, and consistent content is fundamental to engaging your audience, establishing your organization as a thought leader, and nurturing relationships.

What are some Content Formats for SEOs to use?

- **Blog Posts:** Share success stories, policy analyses, interviews with beneficiaries, volunteer spotlights, and expert opinions related to your cause.
- **Videos:** Powerful for conveying emotion and showcasing impact. Short documentaries about your projects, testimonials, or animated explainers can be highly effective.
- **Infographics:** Visually appealing way to present data, statistics, and complex information about social issues.
- **Podcasts:** Offer an accessible way to discuss topics in depth, interview experts, or share narratives.
- **Annual Impact Reports:** Transform dry reports into engaging digital content.

What tools are essential to master?

- **Blogging Platforms:** While your website should host your primary blog, platforms like Medium can extend your reach and tap into new audiences interested in social impact topics. The article "Digital Marketing 101: A Beginner's Guide to Building an Online Presence" on Medium offers a general overview that complements these strategies.
- **Visual Content Creation:** Adobe Spark (now Adobe Express) and Canva are excellent for creating engaging graphics and short videos.
- **Video Production:** Loom is great for quick screen recordings and simple video messages. For more advanced video editing, consider DaVinci Resolve (free professional software) or Adobe Premiere Pro.

Email Marketing

Email marketing remains one of the most effective channels for direct communication, fostering deeper engagement, and driving specific actions (e.g., donations, event registrations, volunteer sign-ups).

How can Email marketing help your business?

- Segmentation: Segment your audience (e.g., donors, volunteers, general subscribers) to send highly targeted and personalized communications, increasing relevance and open rates.
- Automation: Set up automated email sequences for new subscribers (welcome series), donation confirmations, or event reminders.
- Content: Newsletters, impact updates, calls to action, fundraising appeals, and invitations to events.

What Tools are essential to master?

- Email Marketing Platforms: Mailchimp (user-friendly, good free tier for small organizations), Constant Contact (strong for event management and small businesses), and SendinBlue (now Brevo - offers robust automation and transactional email capabilities) are popular choices.



charity: water

Charity: Water, a non-profit bringing clean and safe drinking water to people in developing countries, is renowned for its innovative and transparent online presence. Their website, charitywater.org, is a masterclass in digital storytelling and impact reporting.

They use Google Maps integration and detailed project pages to show exactly where donor funds are going, providing photos and GPS coordinates of completed water projects. Donors receive email updates with photos and stories from the specific projects they funded.

They heavily leverage video content on their website and YouTube channel to tell compelling stories of impact, showing both the problem and the solution. Their social media channels consistently reinforce this message of transparency and direct impact.

This level of granular, verifiable reporting builds immense trust and has been a cornerstone of their fundraising success.

Charity: Water's approach highlights the ethical use of data to enhance transparency. Their use of mapping and detailed project data can be seen as a precursor to how AI could be used to analyze and present impact data more effectively in the future, always within the bounds of data privacy regulations like GDPR.

Steps to Build Your Online Presence: A Strategic Roadmap

1. Define Your Objectives

Before diving into tools and platforms, clearly articulate **what you aim to achieve** with your online presence. This will guide all subsequent decisions and resource allocation.

- Examples of SEO Objectives:
 - Fundraising: Increase online donations by X% within a year.
 - Volunteer Recruitment: Attract Y new volunteers per quarter.
 - Awareness: Increase brand recognition and understanding of your cause.
 - Advocacy: Mobilize Z number of people for a specific campaign.
 - Service Delivery: Provide online resources or support to beneficiaries.
- Tools: Project management platforms like Trello or Notion are excellent for outlining goals, breaking them down into actionable tasks, assigning responsibilities, and tracking progress.

2. Understand Your Audience: Who Are You Trying to Reach?

Thorough research into your target audience is non-negotiable. Understanding their demographics, online behaviors, preferences, pain points, and motivations is key to crafting relevant content and choosing the right platforms.

- Audience Personas: Create detailed profiles of your ideal supporters, beneficiaries, or partners.
- Listening: Monitor social media conversations, forums, and online communities where your audience gathers.
- Tools:
 - Surveys: Google Forms and Typeform allow you to create simple surveys to gather direct feedback.

- Trend Analysis: Google Trends helps identify popular search queries and trending topics related to your mission.
- Social Listening: Tools like Mention or Brandwatch can track conversations about your organization or cause across the web.

3. Choose the Right Platforms

Based on your objectives and audience insights, select the digital platforms where your efforts will yield the greatest return. It's better to excel on a few key platforms than to have a superficial presence across many.

- Principle of Focus: If your audience is primarily older donors, LinkedIn and Facebook might be more effective than TikTok. If you're engaging young environmental activists, Instagram and TikTok could be paramount.
- Tools:
 - Platform Analytics: Facebook Insights, X Analytics, and Instagram Insights provide valuable data on your existing audience's demographics, engagement patterns, and peak activity times, helping refine your platform strategy.

There is, in this course, a specific lesson on how to choose the right platform based on your organization's needs!

4. Develop a Content Strategy

A well-structured content strategy ensures consistency, relevance, and impact. It defines what content you will create, for whom, when, and on which platforms.

- Content Pillars: Identify recurring themes or topics related to your mission (e.g., "beneficiary success stories," "policy updates," "volunteer spotlights," "how-to guides for sustainable living").
- Content Calendar: Plan and schedule content in advance to maintain a consistent publishing rhythm. This helps avoid last-minute scrambling and ensures a steady flow of valuable information.
- Repurposing Content: Maximize your efforts by transforming content across formats (e.g., a blog post into an infographic, a video interview into a podcast episode).
- Tools:
 - Content Calendars: CoSchedule and Airtable offer robust features for content planning, scheduling, and team collaboration. Many social media management tools like Hootsuite also have integrated content calendars.

5. Invest in Visual Branding

A cohesive visual identity is paramount for instant recognition and conveying professionalism. This includes your logo, color palette, typography, and imagery style.

- **Brand Guidelines:** Develop a style guide that dictates how your brand elements should be used across all online platforms. This ensures uniformity even with multiple content creators.
- **Storytelling Through Visuals:** Use compelling images and videos that authentically reflect your mission and impact.
- **Tools:**
 - **Design Platforms:** Canva is an accessible tool for creating a wide range of branded visuals. For more advanced design, Adobe Creative Suite (Photoshop, Illustrator, InDesign) remains the industry standard. Crello (now VistaCreate) is another user-friendly alternative.

6. Engage Regularly with your audience

An online presence is a two-way street. Active and prompt engagement with your audience builds trust, fosters loyalty, and transforms followers into advocates.

- **Responsiveness:** Respond to comments, messages, reviews, and direct inquiries promptly and thoughtfully.
- **Interaction:** Ask questions, run polls, host Q&A sessions, and encourage user-generated content.
- **Community Management:** Cultivate a positive and supportive online community around your cause.

Conclusion

In summary, building and maintaining a robust online presence represents a strategic imperative for Social Economy Organizations in the digital era. It is no longer merely an option, but a necessity to amplify their mission, attract resources, and connect meaningfully with beneficiaries, volunteers, and supporters. By adopting a targeted approach that integrates a functional website, strategic social media management, search engine optimization, effective content strategy, and direct email communication, SEOs can overcome challenges related to limited resources. The key to success lies in consistency, continuous engagement, and the ability to adapt to the dynamic digital landscape,

transforming their online presence into a powerful tool for social impact and organizational growth.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. [charity: water Official Website](#) Accessed on July 29, 2025
2. [The Cost of a Bad Online Presence](#) (Forbes) Accessed on July 29, 2025
3. [Digital Marketing 101: A Beginner's Guide to Building an Online Presence](#) (Medium) Accessed on July 29, 2025
4. [Digital Strategy for Nonprofits](#) (npENGAGE) Accessed on July 29, 2025
5. [The EU AI Act explained](#) (IBM) Accessed on July 29, 2025
6. [The European Accessibility Act Explained](#) (European Commission) Accessed on July 29, 2025
7. [GDPR Compliance Checklist for Nonprofits](#) (TechSoup) Accessed on July 29, 2025
8. [How Nonprofits Are Using Social Media to Drive Impact](#) (CauseVox) Accessed on July 29, 2025
9. [Malala Fund Official Website](#) Accessed on July 29, 2025
10. [NIST Cybersecurity Framework](#) (National Institute of Standards and Technology) Accessed on July 29, 2025
11. [Nonprofit Marketing Guide](#) (National Council of Nonprofits) Accessed on July 29, 2025
12. [World Economic Forum: Digital Transformation Initiative](#) (World Economic Forum) Accessed on July 29, 2025
13. [Why your nonprofit needs a modern website](#) (Classy) Accessed on July 29, 2025



Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following is NOT considered a core component of a strong online presence for an organization?

- a) Website
- b) Social Media Platforms
- c) Physical Office Location**
- d) Search Engine Optimization (SEO)

Question 2

For Social Economy Organizations (SEOs), what is a key benefit of defining clear objectives before building an online presence?

- a) It guarantees immediate viral success on social media.
- b) It helps in selecting the right platforms and allocating resources effectively.**
- c) It eliminates the need for any content creation.
- d) It reduces the overall cost of website development to zero.

Question 3

What is a primary purpose of using tools like Google Analytics or Hotjar in managing an online presence?

- a) To automatically generate all social media content.
- b) To track visitor behavior and optimize pages for better performance.**
- c) To manage email marketing campaigns exclusively.
- d) To process online donations directly.

Lesson 3

Sustain an inclusive and bias-free user experience

Expected reading time: 15 minutes

Main page content

User Experience (UX) refers to the holistic perception and interaction users have with a digital product, particularly a website. It encompasses not just the aesthetic design, but also the crucial aspects of usability, accessibility, and the overall satisfaction a user derives from navigating a site. A well-crafted UX is necessary for achieving organizational objectives. A great website is one that provides an intuitive, user-friendly experience that encourages visitors to stay longer, explore more, and ultimately convert into customers or, in the case of social economy organizations, active participants and supporters.

However, the digital landscape introduces complex challenges related to biases that can unintentionally shape website design and user interaction. These biases can lead to the exclusion of certain demographic groups, severely reduce accessibility for individuals with disabilities, or profoundly hinder the overall effectiveness and inclusivity of a website.

Therefore, a deep understanding of core UX principles, coupled with a proactive strategy to address and mitigate biases—especially those amplified or introduced by AI—is critical for building a truly inclusive, equitable, and user-centered online presence in the AI era.

This video https://www.youtube.com/watch?v=C1Y7bp4qEsM&ab_channel=Mrkt360 can help you in understanding the basics of UX, before jumping on to the lesson to delve in the relations between ux and biases.

Core Principles of User Experience Design for Websites

Effective UX design is built upon several foundational principles, each crucial for creating an engaging and accessible digital experience. Here is a list of them, followed by some practical tools that can help your organization in its UX journey:

- **Simplicity:** The website should be intuitively easy to navigate, with content presented in a clear, concise, and understandable manner. Overly complex interfaces can alienate users, leading to frustration and disengagement.
 - Tools: Platforms like Wix or Squarespace offer clean, pre-designed templates that prioritize straightforward navigation and content presentation. For more customized solutions, design systems like Material Design or Ant Design provide frameworks for consistent simplicity.
- **Accessibility:** Websites must be usable by all individuals, including those with disabilities. This principle is not merely a legal requirement in many jurisdictions (e.g., European Accessibility Act) but a fundamental ethical imperative to ensure equitable access to information and services.
 - Tools: Comprehensive accessibility testing tools include WAVE, Axe, and Google Lighthouse. Implementing standards like WCAG (Web Content Accessibility Guidelines) version 2.1 or 2.2 is essential. The European Union's Web Accessibility Directive (Directive (EU) 2016/2102) mandates adherence to WCAG 2.1 for public sector bodies' websites and mobile applications.
- **Consistency:** Maintaining consistent design elements, such as typography, color palettes, iconography, and navigation menus, across all pages fosters familiarity and reduces cognitive load for users.
 - Tip: A detailed style guide or design system serves as a central reference, ensuring uniformity across the entire website and among different design and development teams. As noted by Forge & Smith, "Consistency in design elements... makes a website predictable and easy to use" (Forge & Smith, n.d.).
- **Responsiveness:** The website must adapt seamlessly to various devices, including smartphones, tablets, and desktops, providing an optimal viewing and interaction experience regardless of screen size. This is crucial given the diverse ways users access online content today.
 - Tools: Frameworks like Bootstrap, Foundation, or CSS Grid and Flexbox are indispensable for building responsive layouts.
- **Feedback:** Users require clear and immediate feedback for their actions, whether it's a visual loading animation, a confirmation message after a form submission, or an error notification. This instills confidence and guides users through their journey, preventing frustration.
 - Tip: Tools like Typeform or Gravity Forms can enhance the feedback process within forms, while visual cues like progress bars or success messages are crucial.

- **Performance:** Optimizing website load times and overall site performance is paramount to prevent user frustration and reduce bounce rates. Slow websites negatively impact user satisfaction, search engine rankings, and ultimately, organizational goals.
 - Tools: PageSpeed Insights, GTmetrix, and WebPageTest are widely used for analyzing and improving site speed. Content Delivery Networks (CDNs) also significantly enhance performance by serving content from geographically closer servers.



Microsoft has made significant strides in integrating AI to enhance accessibility across its products. One notable example is the "Immersive Reader" feature available in Microsoft Edge, Word, and OneNote. This AI-powered tool uses natural language processing and machine learning to simplify text for users with dyslexia, ADHD, or other learning differences. It can adjust text size, spacing, background colors, and even read text aloud with synchronized highlighting, significantly improving readability and comprehension. Furthermore, Microsoft's AI tools for image recognition automatically generate descriptive alt text for images, making web content more accessible for visually impaired users who rely on screen readers. This proactive use of AI moves beyond basic compliance to genuinely empower users with diverse needs.

Common Biases in Website Design and UX

Biases, often subconscious, can permeate website design, leading to exclusionary experiences. With the increasing integration of AI, these biases can be amplified or even originate within the algorithms themselves, posing significant challenges to inclusive UX.

- **Confirmation Bias:**
 - Definition: Designers or AI algorithms may inadvertently assume users share their preferences, expectations, or demographic characteristics, leading to content, navigation, or features that cater only to a specific, often dominant, audience segment.

- Impact: This severely limits inclusivity by neglecting the diverse needs, perspectives, and cultural contexts of a broader user base. In AI, this manifests when training data for personalization algorithms only reflects a narrow demographic, causing the AI to reinforce existing biases and create "filter bubbles."
- Example: A donation page designed with complex, multi-step forms might work for tech-savvy users, but it could significantly alienate older individuals or those with limited digital literacy. An AI-driven content recommendation engine, trained on data primarily from a specific user group, might consistently recommend content that aligns with that group's preferences, inadvertently creating "filter bubbles" for other users and reinforcing their existing views.
- **Anchoring Bias:**
 - Definition: An overemphasis on the first piece of information users encounter, whether it's a prominent hero image, a headline, or the initial set of recommendations. This initial information disproportionately influences subsequent judgments.
 - Impact: If the homepage or an AI-curated feed prioritizes a specific message, product, or demographic group, other important information or diverse perspectives may be overlooked or deprioritized, even if they are more relevant to a segment of the audience.
 - Example: A non-profit homepage that exclusively highlights large corporate donors might unintentionally alienate or discourage potential individual supporters who perceive their contributions as less significant. Similarly, an AI-powered search result ranking, if heavily biased towards the most frequently clicked items initially, might inadvertently obscure equally relevant but less popular alternatives, limiting user discovery.
- **Cultural Bias:**
 - Definition: Designs, content, or AI-generated outputs that predominantly reflect the cultural norms, languages, or visual aesthetics of the designer's or algorithm's origin, thereby excluding or misrepresenting other cultural contexts.
 - Impact: Global audiences, or even diverse local communities, may struggle to navigate, understand, or engage meaningfully with the site, leading to alienation and reduced global reach.
 - Example: Using only local currencies, region-specific idioms, or images that lack cultural diversity. An AI chatbot designed using a dataset predominantly from one linguistic or cultural group might struggle with nuances or specific

cultural references from another, leading to miscommunication or offensive responses.

- **Status Quo Bias:**

- Definition: A strong resistance to changing outdated design elements, legacy user flows, or established content structures, even when evidence suggests they are inefficient, non-inclusive, or no longer align with user expectations.
- Impact: This leads to a poor user experience as users increasingly expect modern, intuitive, and efficient design standards. It can also prevent the adoption of new accessibility features or inclusive design practices, hindering a website's evolution.
- Example: Clinging to outdated navigation styles (e.g., complex dropdown menus from the early 2000s) that are less intuitive for modern users who expect streamlined, mobile-first interactions. This bias can also hinder the integration of new AI-powered features that could enhance UX but require a departure from established patterns.

- **Gender Bias:**

- Definition: Content, visuals, language, or AI algorithms that unintentionally exclude, stereotype, or misrepresent individuals based on gender. This can be subtle, appearing in word choices, imagery, or the types of recommendations given.
- Impact: This alienates diverse audiences, damages brand reputation, and significantly reduces engagement by failing to reflect the gender diversity of the user base.
- Example: A website using exclusively male-oriented imagery or language for leadership roles, or a job application portal where AI algorithms filter resumes in a way that disproportionately favors one gender over another based on historical data biases. Studies by organizations like the World Economic Forum (WEF) consistently highlight the pervasive nature of gender bias in AI algorithms and their real-world impact.



Many online job portals leverage AI-powered algorithms to recommend job postings to users and filter candidate resumes for recruiters. A significant problem arises when these algorithms are trained on historical hiring data, which often contains inherent human biases.

For instance, Amazon's experimental AI recruiting tool, developed in 2014, was designed to automate the review of job applications. However, as reported by Reuters in 2018, the system taught itself that male candidates were preferable, penalizing resumes that included the word "women's" (as in "women's chess club captain") and downranking graduates from two all-women's colleges.

This bias stemmed from the AI observing patterns in the company's past hiring decisions, which had historically favored men in technical roles. Amazon eventually scrapped the tool due to its discriminatory output.

Addressing Biases in UX Design

Mitigating biases requires a multifaceted and proactive approach, with particular attention to how AI systems are designed, trained, and deployed.

- **Conduct Comprehensive User Research:** Systematically collect feedback from highly diverse user groups—spanning various ages, cultural backgrounds, abilities, socio-economic statuses, and geographic locations—to genuinely understand their unique needs, expectations, and pain points. This involves both qualitative (interviews, focus groups) and quantitative (surveys, analytics) methods. Forge & Smith emphasize the importance of understanding the target audience as a core principle for a great website (Forge & Smith, n.d.).
- **Embrace Inclusive Design Principles:** Design for the widest possible audience from the outset, actively considering age, culture, gender identity, socio-economic status, and a full spectrum of abilities. This goes beyond mere accessibility compliance and aims to create universally usable experiences. The NIST (National Institute of Standards and Technology) provides valuable frameworks for evaluating and mitigating bias in AI systems, which are directly applicable to inclusive design.
- **Implement Robust Cultural Support:** adapt content and design to resonate with specific cultural contexts. This goes beyond mere translation to full localization, considering cultural nuances, imagery, and even payment methods.
- **Regular Usability and Bias Testing:** Continuously test design variations and user flows to identify usability issues and detect emergent biases. A/B testing is crucial for comparing different design iterations, while multivariate testing can assess the

impact of multiple variables simultaneously. Forge & Smith highlight testing as integral to user-friendliness (Forge & Smith, n.d.).

NETFLIX

Netflix extensively uses AI to personalize content recommendations, but also actively works to mitigate cultural bias by investing heavily in localization beyond just translation.

For instance, when launching in India, Netflix invested in producing original Indian content and also in localizing existing global content with culturally appropriate subtitles, dubbing, and even promotional imagery. Their AI models are trained on regional viewing patterns to suggest content that resonates locally, and they adapt UI elements to fit cultural reading directions or visual preferences.

This approach addresses cultural bias by offering a tailored experience rather than a one-size-fits-all global template, increasing engagement and satisfaction across diverse markets.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Dastin, J. (2018, October 10). "Amazon scraps secret AI recruiting tool that showed bias against women." Reuters. <https://www.reuters.com/article/us-amazon-com-jobs-automation-idUSKCN1MK08G> Accessed July 29, 2025
2. HBR. What do we do about biases in AI? <https://hbr.org/2019/10/what-do-we-do-about-the-biases-in-ai> Accessed July 29, 2025
3. IBM. Shedding light on AI bias <https://www.ibm.com/think/topics/shedding-light-on-ai-bias-with-real-world-examples> Accessed July 29, 2025
4. European Commission. (2021). "Proposal for a Regulation laying down harmonised rules on Artificial Intelligence (Artificial Intelligence Act)." <https://digital-strategy.ec.europa.eu/en/policies/regulatory-framework-artificial-intelligence> Accessed July 29, 2025
5. W3C (World Wide Web Consortium). (2018). "Web Content Accessibility Guidelines (WCAG) 2.1." <https://www.w3.org/TR/WCAG21/> Accessed July 29, 2025

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following biases can be amplified when AI algorithms are trained on historical data, potentially leading to exclusion in areas like job recruitment, as seen in the Amazon case study?

- a) Status Quo Bias
- b) Anchoring Bias
- c) Confirmation Bias
- d) Gender Bias**

Question 2

According to the lesson, what is a key benefit of Microsoft's AI-powered "Immersive Reader" feature in enhancing accessibility?

- a) It automatically generates marketing content for websites.
- b) It simplifies text for users with learning differences and provides audio narration.**
- c) It optimizes website loading times across different devices.
- d) It predicts user purchasing behavior to offer personalized discounts.

Question 3

For Social Economy Organizations (SEOs), how can biased UX, especially if amplified by AI, directly undermine their core mission?

- a) By increasing their marketing budget and attracting more corporate sponsors.
- b) By enhancing their search engine optimization (SEO) rankings and increasing website traffic from affluent demographics.
- c) By eroding trust and excluding vulnerable populations from accessing vital services and information.**
- d) By attracting a larger global audience regardless of cultural differences, leading to simplified operations.

Lesson 4

Keeping your website up to date

Expected reading time: 15 minutes

Main page content

In today's rapidly evolving digital landscape, a website is far more than a static informational brochure; it is a dynamic, living asset that serves as the cornerstone of an organization's online identity and engagement strategy. An outdated website, much like an unkempt storefront, can quickly lead to diminished credibility, severe security vulnerabilities, a suboptimal user experience, and ultimately, a significant erosion of user trust. Neglecting regular maintenance can result in broken functionalities, irrelevant content, poor search engine visibility, and a failure to meet modern accessibility standards.

This lesson delves into the critical strategies, essential processes, and indispensable tools that empower organizations to maintain and update their digital platforms effectively, ensuring they remain current, secure, performant, and engaging without overwhelming internal teams.

Building on the critical importance of website maintenance, the video "Webcentral: Why You Need To Update Your Website Content" (at https://www.youtube.com/watch?v=hrOMyhao6b4&ab_channel=WebFX) emphasizes that a website is a dynamic entity requiring constant attention. It highlights that regularly updating content is crucial for enhancing user experience and SEO rankings. The video offers five practical tips: conduct regular SEO audits, analyze competitors, integrate multimedia elements, test various changes, and refresh outdated content and design.

We will explore how a strategic approach to website maintenance not only mitigates risks but also unlocks new opportunities for growth, user engagement, and digital innovation.

Core Processes for Sustaining an Up-to-Date Website

Effective website maintenance is a multifaceted discipline that encompasses content, design, technical infrastructure, user experience, and search engine optimization. Each component requires a systematic approach and consistent attention.

1. Content Audits

- What it is: A comprehensive and systematic review of all textual, visual, and multimedia content present on the website. The primary objective is to evaluate its accuracy, relevance, consistency, tone, and alignment with current organizational goals and messaging. This process goes beyond mere proofreading; it's about strategic content lifecycle management.
- How to do it:
 - Identification of Outdated or Redundant Content: Systematically go through each page and section. Ask critical questions: Is this information still correct? Does it serve a current purpose? Is it duplicated elsewhere? Consider archiving or removing content that no longer adds value. The Webcentral blog emphasizes that content should be "relevant" and "accurate," advising removal of "outdated information."
 - Updating Information: This includes refreshing statistics, contact details, team member information, event schedules, policy documents, and news archives. Ensure all references to external data are current and cited.
 - Broken Link Detection: Employ automated tools to scan for internal and external broken links (404 errors). Tools like Screaming Frog SEO Spider (for comprehensive site crawls) or dedicated WordPress plugins such as Broken Link Checker can identify and help rectify these issues, which negatively impact SEO and user experience.
 - Content Performance Review: Beyond accuracy, analyze content performance using analytics. Which pages have high bounce rates? Which content pieces drive conversions? This informs content strategy and identifies areas for improvement or expansion.
- Frequency: Quarterly or semi-annually, depending on the volume and dynamism of the content. High-traffic news sections or event calendars may require more frequent, even daily, checks.

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2. Design and Layout Updates

- What it is: The periodic refreshing of the website's visual elements, user interface (UI), and structural layout to adhere to evolving design principles, technological advancements, and shifting user expectations. This ensures the site remains modern, intuitive, and competitive. Webcentral notes that "modern web design is always evolving" and advises regular aesthetic updates.
- How to do it:
 - Analytics-Driven Design Review: Utilize web analytics platforms to pinpoint pages or sections with suboptimal engagement metrics (e.g., low time on

page, high exit rates). This data can suggest areas where design improvements could enhance user flow or content discoverability.

- Integrating User Feedback: Actively solicit and incorporate feedback from your target audience regarding design aesthetics, usability, and navigational ease. This can be done through surveys, focus groups, or direct feedback forms.
 - Prototyping and Wireframing: Before implementing major design changes on the live site, create mock-ups and prototypes using dedicated design tools. Figma (for collaborative UI/UX design) and Adobe XD (for interactive prototypes) allow for iterative testing and stakeholder review, minimizing risks during deployment.
 - Responsive Design Audit: Continuously verify that the website renders flawlessly across all devices and screen sizes (desktops, tablets, various mobile phones). This is crucial for accessibility and SEO.
- Frequency : Annually for significant overhauls or based on accumulating user feedback and emerging design trends. Smaller, incremental UI improvements can be rolled out more frequently.

3. Technical Maintenance

- What it is: The critical suite of activities focused on ensuring the website's underlying technical infrastructure is secure, optimized for performance, and fully functional. This encompasses server-side operations, database integrity, and software updates. Webcentral emphasizes the importance of keeping "software up to date" to prevent "vulnerabilities."
- How to do it:
 - CMS and Plugin/Theme Updates: Regularly install the latest security patches and feature updates for your Content Management System (e.g., WordPress, Joomla, Drupal) and all installed plugins/extensions and themes. These updates often address vulnerabilities and improve performance. Crucially, always back up your site before major updates.
 - Security Scans and Vulnerability Assessments: Proactively scan your website for malware, unauthorized access attempts, and common security vulnerabilities. Tools like Sucuri SiteCheck (for malware and blacklist checks) or Wordfence Security (for WordPress-specific security) are invaluable.
 - Performance Optimization: Implement and configure caching mechanisms to speed up page load times. Tools such as W3 Total Cache or WP Rocket for WordPress can significantly improve performance by serving cached versions of your pages. Other optimizations include image compression, minifying CSS/JavaScript, and leveraging Content Delivery Networks (CDNs).

- Database Optimization: Periodically clean and optimize your website's database to remove unnecessary data and improve query speeds. Most CMS platforms offer tools or plugins for this.
- Backups : Establish a robust, automated backup schedule for both website files and databases. Store backups in multiple, secure locations (e.g., off-site cloud storage). This is your last line of defense against data loss or corruption.
- Frequency : Monthly for routine updates and performance checks, with immediate attention required for critical security patches. Daily or weekly backups are recommended depending on content update frequency.

4. User Experience (UX) Testing

- What it is: The systematic evaluation of your website's usability, accessibility, and overall functionality from the perspective of the end-user. The goal is to identify and rectify pain points, ensuring a smooth, intuitive, and satisfying experience for all visitors.
- How to do it:
 - Usability Testing: Recruit a diverse group of target users to perform specific tasks on your website while observing their interactions. This can reveal unexpected difficulties or areas of confusion.
 - Heatmaps and Session Recordings: Utilize tools that visually represent user behavior. Hotjar provides heatmaps (showing where users click, move, and scroll) and session recordings (allowing you to watch anonymous user sessions), which are invaluable for identifying navigation bottlenecks, overlooked content, or areas of frustration.
 - Mobile Responsiveness and Cross-Browser Compatibility: Verify that the website renders and functions correctly across a wide range of devices (smartphones, tablets) and web browsers (Chrome, Firefox, Safari, Edge). BrowserStack offers extensive cloud-based testing environments for this purpose.
 - Accessibility Testing: Ensure your website complies with Web Content Accessibility Guidelines (WCAG) to make it usable for individuals with disabilities. Tools like Lighthouse (built into Chrome DevTools) or specialized accessibility checkers can help identify issues.
- Frequency: Semi-annually or after any significant design changes or new feature rollouts. Ongoing monitoring with analytics and feedback mechanisms should also be in place.

5. SEO and Analytics Reviews

- What it is: The continuous process of optimizing your website to achieve higher rankings in search engine results pages (SERPs) and analyzing performance data to understand user behavior and measure goal attainment. Webcentral points out that a site "needs to be optimised for search engines" to remain competitive.
- How to do it:
 - On-Page SEO Optimization: Regularly update meta descriptions, title tags, keywords, image alt text, and internal linking strategies to reflect current SEO best practices and content relevance. Ensure content is optimized for target keywords without keyword stuffing.
 - Analytics Data Review: Delve into data from platforms like Google Analytics 4 (GA4) or privacy-focused alternatives like Matomo. Analyze metrics such as traffic sources, bounce rate, time on page, conversion rates, and user demographics to identify trends, popular content, and areas for improvement.
 - Core Web Vitals Optimization: These are Google's metrics for user experience (Largest Contentful Paint, First Input Delay, Cumulative Layout Shift). Optimizing these aspects significantly enhances search rankings and user satisfaction. Tools like Google PageSpeed Insights can help diagnose and suggest improvements.
 - Backlink Profile Audit: Monitor your backlink profile to ensure you are acquiring high-quality, relevant links and disavowing any spammy or harmful links that could negatively impact your SEO.
- Frequency: Monthly for reviewing analytics and performance, and quarterly for *more in-depth SEO audits and strategy adjustments*.

6. Feedback Collection

- What it is: Establishing proactive channels to gather direct input from your website users. This continuous feedback loop is vital for understanding user needs, identifying pain points, and prioritizing improvements.
- How to do it:
 - On-Page Feedback Forms: Integrate subtle, easy-to-use feedback forms on key pages (e.g., "Was this page helpful?" or a comment section) using tools like Typeform or Google Forms.
 - Surveys and Polls: Distribute surveys via email newsletters, social media, or pop-ups on the website to gather more structured feedback on specific topics or overall satisfaction.

- Customer Service Chatbots and Support Channels: Leverage AI-powered chatbots like Intercom or traditional customer support channels to collect real-time insights from user queries and issues. These interactions often highlight common pain points or missing information.
 - Social Listening: Monitor mentions of your website or organization on social media platforms to gauge public sentiment and identify emerging issues or topics of interest.
- Frequency: Ongoing, integrated into the user journey and communication strategy.



The Challenge: UNICEF, a global leader in child welfare, relies on its website to communicate with millions of donors and supporters. In a fast-moving world, they needed to ensure their website reflected the most current crises and campaigns, but a static site would be slow to update and feel out of touch.

The Strategy: UNICEF uses a highly dynamic and modular website design. Their content management team is trained to quickly deploy new, templated content blocks for breaking news and urgent appeals. For example, in response to a natural disaster, a team member can rapidly create a new campaign page with real-time updates, photos from the field, and a clear call to action for donations. They don't have to wait for a developer to manually code a new page.

The Result: By focusing on a dynamic, up-to-date website, UNICEF is able to respond to global events with agility. Their website serves as a reliable, real-time source of information, which builds trust with their audience and allows them to mobilize support for critical, time-sensitive campaigns much more effectively. This commitment to fresh, relevant content keeps their audience engaged and their credibility intact.

Best Practices for Sustaining Website Updates: A Proactive Framework

Moving beyond reactive fixes, these best practices foster a culture of continuous improvement for your digital presence.

- **Create a Comprehensive Website Maintenance Plan:** Formalize your strategy by documenting all processes, clearly assigning responsibilities to individuals or teams, and establishing a regular, predictable schedule for all review and update activities. This plan should be a living document, reviewed and updated periodically. As an example, try to assign monthly content audits and blog post scheduling to the communications team, bi-weekly plugin updates and security scans to the IT department, and quarterly SEO reviews to the marketing specialist.
- **Leverage Automation Tools Strategically:** While human oversight is crucial, automation can handle repetitive and time-consuming tasks. Beyond backups and performance monitoring (e.g., using Pingdom for uptime monitoring), consider automated broken link checkers, image optimizers, and content re-publication schedules.
- **Regularly Engage Your Audience:** Your users are your most valuable source of feedback. Use email newsletters, social media channels, and on-site announcements to inform users about new updates, features, and content. Crucially, actively solicit their feedback and demonstrate that their input is valued and acted upon.
- **Monitor Industry Trends and Technological Advancements:** The web landscape is constantly evolving. Stay informed about new web standards (e.g., HTML5, CSS3), emerging design paradigms (e.g., dark mode, micro-interactions), and significant updates from search engines (e.g., Google's algorithm changes). Follow reputable industry blogs, attend webinars, and subscribe to relevant newsletters (e.g., from the World Wide Web Consortium - W3C for web standards).
- **Set Clear Key Performance Indicators (KPIs) and Measure Impact:** Define measurable objectives for your website (e.g., increased traffic, reduced bounce rate, higher conversion rates, improved page load speed). Use analytics tools to regularly track these KPIs and assess the effectiveness of your updates. This data-driven approach allows you to justify resources and refine your maintenance strategy.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Broken Link Checker (WordPress Plugin): <https://wordpress.org/plugins/broken-link-checker/> Accessed July 29, 2025
2. BrowserStack: <https://www.browserstack.com/> Accessed July 29, 2025
3. Directive (EU) 2016/2102 (Web Accessibility Directive): <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32016L2102> Accessed July 29, 2025
4. Directive (EU) 2019/882 (European Accessibility Act): <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019L0882> Accessed July 29, 2025
5. Google PageSpeed Insights: <https://pagespeed.web.dev/> Accessed July 29, 2025
6. Webcentral Blog - Is your website up to date: <https://webcentral.au/blog/is-your-website-up-to-date> Accessed July 29, 2025
7. Cloudways. Updating your website <https://www.cloudways.com/blog/updating-website-content/> Accessed July 29, 2025

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following is NOT listed as a potential negative consequence of an outdated website?

- a) Diminished credibility
- b) Severe security vulnerabilities
- c) Increased conversion rates**
- d) Suboptimal user experience

Question 2

According to the lesson and insights from Webcentral, what is a key benefit of consistently updating your website's content and technical aspects?

- a) It solely benefits aesthetic appeal.
- b) It allows for less frequent user feedback collection.
- c) It can lead to higher SEO rankings and improved user trust.**
- d) It removes the need for any manual security checks.

Question 3

The example of "Associazione Volontari Italiani Sangue (AVIS) - Sezione Provinciale di Napoli" primarily illustrates which common challenge for social economy organizations?

- a) Over-reliance on commercial web agencies.
- b) Difficulty in managing excessive online donations.
- c) Challenges due to outdated information, poor mobile responsiveness, and security vulnerabilities with limited resources.**
- d) The need for more complex website animations

Lesson 5

Showcasing and selling digital products and services

Expected reading time: 20 minutes

Main page content

A website serves as a vital platform to showcase your products or services to a global audience. For organizations, whether focused on commercial ventures or social initiatives, presenting offerings in a clear, engaging, and user-friendly way is essential to drive action, such as purchases, donations, or sign-ups. In today's competitive digital landscape, merely having a presence is not enough; the effectiveness of your online presentation directly correlates with user engagement and conversion rates.

This lesson will explore advanced strategies and best practices for effectively showcasing your products and services online, delving deeper into visual storytelling, structured content, and sophisticated tools to optimize presentation, enhance user experience, and drive measurable outcomes. We will incorporate insights from digital marketing and user experience (UX) research, along with real-world examples and authoritative resources.

To illustrate the practical application of building an effective online presence, consider platforms like Shopify. A comprehensive guide, such as the video available at https://www.youtube.com/watch?v=NCR62mMFIGo&ab_channel=DropshipDreams, details the process of setting up and managing a Shopify store. The video covers essential steps from selecting a plan and configuring payment options, to designing your store with customized themes and product organization. It also delves into crucial management aspects like shipping and tax rates, and vital marketing strategies, including Google Analytics integration, social media promotion, email marketing, and SEO optimization.

Key Principles for Effective Online Showcasing

The foundational elements of a compelling online presentation revolve around clarity, visual impact, strategic placement, and building trust.

Clarity and Simplicity: The Cornerstone of User Understanding

Presenting your offerings in a straightforward manner, devoid of technical jargon, is paramount. Users often scan rather than read thoroughly, so conciseness and immediate comprehension are key.

- Tip: Beyond brief descriptions, integrate interactive elements like "quick view" options that reveal more details upon hover, or expandable sections for deeper dives. Clearly outline key benefits using action-oriented language, pricing structures (including any hidden costs or subscription models), and an easily discoverable "Learn More" or "Purchase" button. Consider using a Flesch-Kincaid readability test on your content to ensure it's accessible to a broad audience, as recommended by UX best practices (Nielsen Norman Group, 2020).

Visual Appeal: Engaging the Senses

High-quality images, videos, or infographics are not just supplementary; they are central to conveying value and fostering emotional connection. Visuals can communicate complex information far more efficiently than text alone.

- Tools: While Canva, Adobe Photoshop, or Figma are excellent for creation, consider advanced tools like Pixlr for quick edits, Shutterstock Custom for tailored professional photography, or Adobe Premiere Pro for sophisticated video editing. Explore 3D product configurators (e.g., using technologies like WebGL) for e-commerce, allowing users to customize products in real-time. For non-profits, visually impactful infographics summarizing societal impact (e.g., "100 Lives Transformed") can be created using tools like Infogram.

Strategic Placement and Creative Categorization: Guiding the User Journey

The placement of your offerings significantly influences user engagement. Prime digital real estate, such as the homepage or dedicated product pages, should be leveraged effectively. Modern approaches emphasize creative categorization and personalization.

- Tip: Implement testing on different layouts (e.g., carousel vs. grid) to determine what resonates most with your target audience. Beyond static displays, consider dynamic content sections that personalize offerings based on user Browse history or demographics. As highlighted by ConvertCart, creative categorization is crucial. Think beyond generic labels; organize products by seasonal holidays, specific mood boards, or product benefits. For instance, Lush Cosmetics prominently features categories with sliding banners, creating immersive paths through subcategories and curated content that aligns with their brand language . This approach helps users easily find what they are looking for and engages them with a tailored Browse experience.

Social Proof: Building Trust and Credibility

In the absence of physical interaction, social proof becomes a powerful trust-building mechanism. Testimonials, reviews, and case studies validate your offerings and instill confidence.

- **Tools:** Beyond Trustpilot or Google Reviews, integrate specialized review management platforms like Yotpo (for e-commerce) or G2 Crowd (for services) that offer advanced features like review moderation, Q&A sections, and user-generated content displays. For non-profits, video testimonials from beneficiaries or impact reports endorsed by credible organizations (e.g., annual reports from the Charity Navigator or GuideStar) can be profoundly impactful. Displaying "verified buyer" labels, as seen on sites like Bite, enhances credibility by assuring potential customers that reviews come from genuine purchasers.

Structuring Product and Service Pages for Maximum Impact

A well-structured product or service page guides the user through the information efficiently, addressing potential questions and encouraging conversion.

Hero Section: The First Impression

The hero section is your digital storefront window. It needs to be visually striking and instantly convey your core message.

Let's use an example: For a non-profit focused on environmental sustainability, a compelling headline could be: "Invest in a Greener Future: Your Support Fuels Reforestation Efforts," paired with a high-definition drone shot of newly planted forests. For a B2B software company, a concise explainer video demonstrating the software's primary benefit might be more effective than a static image.

Key Features and Benefits: The Value Proposition

Beyond listing features, articulate the direct benefits to the user. How does your offering solve their problem or improve their life?

By Leveraging infographic makers like Piktochart or Venngage for visually appealing highlights. Consider interactive feature tours or animated graphics to demonstrate complex functionalities. For service-based businesses, a "problems we solve" section using an iconographic layout can be highly effective.

FAQs Section: Proactive Problem Solving

Addressing common questions proactively can significantly reduce customer support inquiries and user hesitancy.

By using accordion-style layouts or expandable sections to keep the section compact. Integrate a search bar within the FAQ for extensive knowledge bases. Consider using AI-powered chatbots (e.g., those from Drift or Intercom) to provide instant answers to common queries, as well as directing users to the FAQ.

Interactive Elements: Enhancing Engagement

Interactive elements transform passive viewing into an engaging experience, leading to longer dwell times and better comprehension.

By integrating chat widgets like Tawk.to or Crisp. For product pages, consider embedding 360-degree product viewers (e.g., using Sketchfab for 3D models) or augmented reality (AR) features that allow users to "try on" or "place" products in their environment (e.g., using Google's ARCore or Apple's ARKit). For non-profits, interactive maps showing project locations and impact can be highly engaging.



IKEA, a global furniture retailer, effectively uses interactive product displays to enhance user experience. Their 3D Kitchen Planner allows customers to design their dream kitchen online, dragging and dropping furniture, appliances, and decor into a virtual space. Users can view the design from multiple angles, switch between different styles, and get an immediate price estimate.

This interactive tool goes beyond static images, enabling customers to visualize and customize complex purchases, reducing uncertainty and increasing confidence before visiting a physical store or making an online order. It's a prime example of how interactive tools empower customers to "try before they buy" in a digital environment.

Link: <https://www.ikea.com/us/en/planners/kitchen-planner/>

Best Practices for Highlighting Products and Services

Effective online showcasing requires continuous optimization and adherence to evolving digital best practices.

Optimize for Mobile

With the majority of web traffic now originating from mobile devices, a mobile-first design approach is no longer optional. Beyond responsive design frameworks like Bootstrap, leverage Accelerated Mobile Pages (AMP) for lightning-fast loading on mobile. Regularly test with Google's Mobile-Friendly Test and Lighthouse for performance and accessibility scores.

Use Storytelling to connect with your audience

Narrative connects with users on a deeper level, making your offerings more memorable and relatable.

- Example: A non-profit could feature a "Day in the Life" video of a field worker or a short documentary on the impact of a specific program. A product company could tell the story of its founder's inspiration or the ethical sourcing of its materials.
- Tools: Include embedded videos from platforms like YouTube or Vimeo, or host them directly on a Content Delivery Network (CDN) for faster loading. Create dedicated "Stories" or "Our Impact" sections on your website, using blog posts and multimedia content to share narratives.

Simplify Navigation: User-Centric Design

Intuitive navigation reduces frustration and ensures users can quickly find what they need.

- Tools: Incorporate advanced search plugins like SearchWP or Algolia for robust search functionality. For large catalogs, implement mega menus with categorized links and even images, or use breadcrumb navigation to show users their current location. Conduct usability testing to identify pain points in your navigation structure.

Enable Easy Transactions: Streamlining the Path to Conversion

A frictionless checkout process is crucial for converting interest into action, especially for e-commerce and donations.

- Tools: Payment processors like Stripe, PayPal, or Square are essential. Explore one-click checkout options (e.g., Apple Pay, Google Pay) and offer guest checkout to remove account creation as a barrier. For donations, ensure secure, prominent donation buttons and pre-filled forms for returning donors. Consider integrating with CRM systems (Customer Relationship Management) to track donor history and personalize future asks.

Challenges and Solutions: Overcoming Obstacles

Even with the best strategies, organizations may encounter common challenges in online showcasing.

Challenge: Low Engagement with Product or Service Pages

- Solution 1: Beyond A/B testing layouts, headlines, and CTAs, conduct user interviews and surveys to understand user motivations and pain points. Implement scroll depth tracking to see how much of your page users are actually viewing.
- Solution 2: Leverage personalized recommendations (e.g., "Customers who viewed this also liked...") based on collaborative filtering or content-based filtering. Highlight popular or recommended items using visually appealing tags like "Best Seller" or "Most Popular," backed by genuine sales data.

Challenge: Difficulty Communicating Value

- Solution 1: Develop concise explainer videos (e.g., animated videos for software, live-action for services) that clearly articulate the problem, your solution, and the benefits. Use compelling infographics to break down complex processes or data into easily digestible visuals.
- Solution 2: Implement a storytelling framework across your content, focusing on the "hero's journey" of your customers or beneficiaries. Use powerful imagery and evocative language to connect emotionally with your audience. Integrate micro-stories within product descriptions.

Challenge: High Cart Abandonment Rates (for Products or Donations)

- Solution 1: Beyond email reminders, implement SMS reminders for abandoned carts or donation forms. Offer exit-intent pop-ups with a final incentive (e.g., a small discount, a free resource) to encourage completion.
- Solution 2: Clearly display shipping costs and delivery times early in the checkout process. Offer a variety of trusted payment options, including local payment methods. Implement a progress bar during checkout to show users how many steps remain. For donations, reiterate the impact of their contribution at each step of the form. The Baymard Institute (2023) provides extensive research on e-commerce checkout best practices to reduce abandonment.



Amazon is a pioneer in using personalized product recommendations to drive sales and enhance the shopping experience. Their "Customers Who Bought This Also Bought" or

"Frequently Bought Together" sections, powered by collaborative filtering algorithms, suggest related items based on the purchasing patterns of other users.

Additionally, Amazon's "Recommended for You" section on the homepage leverages a user's Browse history, past purchases, and even items in their cart to display highly relevant product suggestions. This level of personalization significantly increases the likelihood of additional purchases and improves user satisfaction by making product discovery more efficient and tailored to individual interests.

Conclusion

Effectively showcasing your products and services on your website is not merely about listing what you offer; it's about crafting a compelling digital experience that engages your audience, builds trust, and drives desired actions. By focusing on clarity, visual appeal, strategic design, and user-centric principles, combined with continuous data-driven optimization, your organization can present its offerings in the best light, fostering deeper connections and achieving significant online success. Investing in a robust online presence that prioritizes user experience is an investment in your organization's future

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Baymard Institute. (2023). *E-Commerce Checkout Usability*. <https://baymard.com/research/checkout-usability> Accessed July 30, 2025
2. ConvertCart. (2024). *15 Ways To Get The Most Out Of Social Proof (eCommerce)*. <https://www.convertcart.com/blog/what-is-social-proof-and-why-it-is-crucial-for-your-ecommerce-site> Accessed July 30, 2025
3. ConvertCart. (2025). *19 Creative Ways to Display eCommerce Products (w/ Brilliant Examples)*. <https://www.convertcart.com/blog/product-display-creative-ideas> Accessed July 30, 2025
4. Nielsen Norman Group. (2020). *Flesch-Kincaid Readability Test*. <https://www.nngroup.com/articles/flesch-kincaid-readability-test/> Accessed July 30, 2025
5. Nonprofit Marketing Guide. (2022). *Donation Page Best Practices*. <https://www.nonprofitmarketingguide.com/blog/2022/03/24/donation-page-best-practices/> Accessed July 30, 2025

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

According to the lesson, which major retailer is cited as an example for effectively using creative categorization and personalized immersive paths for their products?

- a) Amazon
- b) IKEA
- c) Lush Cosmetics**
- d) ASOS

Question 2

What is a primary benefit of IKEA's 3D Kitchen Planner, as mentioned in the example boxes?

- a) It allows users to physically pick up and feel kitchen components.
- b) It provides immediate price estimates and enables users to visualize and customize complex purchases.**
- c) It connects users directly with an interior designer for live consultations.
- d) It offers exclusive discounts only available through the planner.

Question 3

The #AsSeenOnMe campaign by ASOS primarily serves as an example of which key principle for online showcasing?

- a) Clarity and Simplicity
- b) Strategic Placement
- c) Social Proof through User-Generated Content**
- d) Optimizing for Mobile

Digital marketing using social media

The module includes the following lessons:

6. Build your social media marketing strategy
7. Choose the right platform
8. Create an editorial plan
9. Exploit Paid Social Media Advertising
10. Define your target audience
11. Understand key GDPR requirements for digital marketing
12. Ethical use of data and information

Lesson 6

Build your social media marketing strategy

Expected reading time: 18 minutes

Main page content

Digital marketing is an essential component of any modern organizational strategy, particularly for Social Economy Organizations (SEOs). Unlike traditional marketing, digital marketing leverages online channels and technologies to create, promote, and measure campaigns that engage audiences in a more personalized and scalable manner. In this lesson, we will explore what digital marketing entails, why it is crucial for SEOs, and how it can be effectively used to meet organizational goals.

Before delving into the lesson we recommend you watching this introductory youtube video to briefly understand the basics of digital marketing: <https://www.youtube.com/watch?v=bixR-KIJKYM>

What is Digital Marketing?

Digital marketing encompasses all marketing efforts that use the internet or an electronic device. Businesses and organizations use various digital channels such as search engines, social media, email, and websites to connect with current and prospective audiences. This dynamic approach allows for more personalized, data-driven campaigns that respond to the real-time needs of the audience.

For SEOs, digital marketing offers opportunities to communicate effectively with target groups, tell compelling stories about social impact, and optimize outreach campaigns without significant costs. Traditional methods of outreach, like print or TV advertising, are often prohibitively expensive for smaller organizations. Digital marketing levels the playing field, allowing SEOs to reach a broad audience without a significant budget.

Furthermore, digital marketing allows for precise measurement of success. Tools like Google Analytics, social media insights, and email performance reports enable SEOs to see what is working and adjust their strategy accordingly. For instance, if a particular post on social media receives more attention, it signals what kind of content the audience wants more of.



The World Wildlife Fund (WWF) effectively uses email marketing to engage its vast network of supporters, donors, and advocates.

They go beyond generic newsletters by employing advanced email segmentation and personalization. For example, supporters interested in marine life might receive updates and calls to action specifically about ocean conservation, while those passionate about endangered species might get emails focusing on anti-poaching efforts or specific animal adoptions. WWF's email campaigns often include direct calls to action, such as signing petitions, donating for specific emergencies, or sharing content, making the recipient feel directly involved in conservation efforts.

This personalized approach significantly increases engagement rates and encourages ongoing support for their diverse global initiatives

Key Components of Digital Marketing

- **Content Marketing**

Content marketing involves the creation and sharing of valuable, relevant content to attract and engage a defined audience. For SEOs, this could mean blogs, videos, infographics, or guides that inform the public about their activities, successes, or community impact. Well-crafted content helps build authority and trust, establishing the organization as a credible source of information and as a leader in its area of action. For example, an SEO focused on environmental sustainability could create blog posts on how individuals can reduce their carbon footprint, paired with calls to action to join community programs.

- **Search Engine Optimization (SEO)**

Search Engine Optimization (SEO) is the practice of optimizing content to rank higher in search engine results pages (SERPs). By using SEO strategies, SEOs can ensure that their content is visible to those who are actively searching for information related to their mission. This might involve using relevant keywords, ensuring mobile-friendliness, and providing quality content that answers common questions from their audience. If an organization is working in the healthcare

sector, optimizing a blog post for keywords like "affordable healthcare solutions" can help potential beneficiaries or donors discover them when they search on Google.

- **Social Media Marketing**

Social media platforms such as Facebook, Instagram, LinkedIn, and Twitter are powerful tools for reaching and engaging audiences. SEOs can use these platforms to share updates, promote campaigns, or foster community. Social media is highly effective for storytelling—sharing the stories of people who have benefited from the organization’s work can create emotional connections that lead to higher engagement.

- **Email Marketing**

Email marketing involves sending targeted messages to groups of people. SEOs can use this to keep donors informed, engage volunteers, and maintain relationships with stakeholders. Regular newsletters can be an effective way to provide updates, celebrate achievements, and encourage ongoing support. By using segmentation, organizations can create different types of emails for different groups. For example, previous donors might receive different messages from first-time contributors, ensuring each audience gets the most relevant information.

- **Paid Advertising**

Paid advertising involves using paid channels such as Google Ads or social media ads to promote content. This can be a particularly effective way to reach new audiences or boost visibility for specific campaigns. SEOs can set clear budgets, select specific demographics, and measure the performance of their ads in real time.



Médecins Sans Frontières (MSF), or Doctors Without Borders, is renowned for its powerful and immediate use of social media during humanitarian crises. Instead of just sharing generic updates, MSF leverages platforms like Instagram, Facebook, and Twitter to share raw, impactful stories directly from the field.

They utilize high-quality photography and video, combined with concise narratives, to illustrate the human impact of conflicts, disasters, and epidemics. This approach creates

an immediate emotional connection with their audience, fostering empathy and driving rapid awareness and fundraising efforts during critical moments.

Their strategy ensures their message cuts through noise, allowing them to mobilize support quickly for urgent needs.

What core topics related to digital marketing are going to compose this module?

This lesson serves as your foundational guide, exploring what digital marketing entails, why it is crucial for SEOs, and how it can be effectively used to meet organizational goals. In the upcoming lessons, you will learn to construct robust marketing campaigns, leverage various online tools, and ensure your digital efforts are both effective and ethically sound.

- **Choosing the Right Platform:** With a multitude of social media platforms available, selecting the most appropriate ones for your SEO is a strategic decision. This section will guide you through understanding the demographics, content formats, and engagement styles dominant on platforms like Facebook, Instagram, LinkedIn, and Twitter, enabling you to focus your efforts where your target audience is most active and receptive.
- **Creating an Editorial Plan:** Consistency and relevance are key to digital content success. An editorial plan serves as a roadmap for your content marketing efforts, outlining themes, topics, content formats, and publication schedules. For SEOs, this ensures a steady stream of valuable information and compelling stories that keep your audience engaged and informed about your work and its impact.
- **Exploiting Paid Social Media Advertising:** While organic reach is valuable, paid social media advertising offers powerful tools for amplifying your message and reaching new audiences with precision. This component explores how SEOs can effectively utilize advertising features on platforms like Facebook and Instagram to target specific demographics, interests, and behaviors, maximizing visibility for campaigns, events, or fundraising initiatives within defined budgets.
- **Defining Your Target Audience:** At the heart of any successful digital marketing effort is a clear understanding of who you are trying to reach. This involves segmenting your audience based on demographics, psychographics, behaviors, and needs. For SEOs, accurately defining your target audience ensures your messaging resonates with potential beneficiaries, volunteers, donors, and partners, leading to more effective communication and stronger connections.

- **Understanding Key GDPR Requirements:** In the digital age, legal compliance, particularly regarding data privacy, is non-negotiable. This section will provide an overview of key General Data Protection Regulation (GDPR) requirements relevant to digital marketing activities. For SEOs, understanding these regulations is crucial for responsibly collecting, processing, and storing personal data, ensuring compliance and building trust with your audience.
- **Ethical Use of Data and Information:** Beyond legal compliance, the ethical use of data and information is paramount for SEOs, whose missions are often rooted in social good. This final topic delves into the moral responsibilities associated with leveraging data for marketing purposes, emphasizing transparency, consent, data security, and avoiding practices that could inadvertently lead to discrimination or exploitation of vulnerable populations. It's about aligning your digital marketing practices with your organization's core values.

Conclusion

Digital marketing offers a broad set of tools and techniques that SEOs can use to engage their audience, share their impact, and grow their support base. By understanding the key components such as content marketing, SEO, social media marketing, email marketing, and paid advertising, SEOs can craft more effective campaigns that reach the right people, at the right time, with the right message.

Moving forward, participants should think about the types of content they wish to create and the audiences they want to reach. Effective digital marketing is about matching the right message with the right audience, using data and creativity to make meaningful connections.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following best describes why digital marketing is particularly crucial for Social Economy Organizations (SEOs)?

- a) It is exclusively for large, well-funded organizations.
- b) It offers scalable, adaptable tools for communication and growth, often at lower costs than traditional methods.**
- c) It replaces the need for direct human interaction entirely.
- d) It only allows for one-way communication with the audience.

Question 2

When an SEO creates blog posts, videos, or infographics to inform the public about their activities and build trust, which digital marketing component are they primarily utilizing?

- a) Paid Advertising
- b) Email Marketing
- c) Content Marketing**
- d) Search Engine Optimization (SEO)

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Digital Marketing for social enterprises. <https://emergentdigital.com/social-enterprise-digital-marketing/> Accessed September 12, 2025
2. How successful nonprofits use social media. <https://www.youtube.com/watchv=NIUEl9sBmuQ&list=PLVO1n7MLtZAUTMFodHAz0t8Lj2FmlzQa8&index=2> Accessed September 12, 2025
3. Investing in social media for nonprofits. <https://fundeasy.com/blog/investing-in-social-media-for-nonprofits> Accessed September 12, 2025

Lesson 7

Choosing the right platform

Expected reading time: 18 minutes

Main page content

The objective of this lesson is to help you understand how to effectively select the most suitable digital platforms for your organization's needs. Choosing the right platform can significantly enhance your engagement levels, broaden your audience reach, and ultimately improve the overall success of your digital marketing initiatives.

Throughout this lesson, you will explore different types of platforms, evaluate their suitability based on audience characteristics, content type, and organizational goals, and align these choices with your overall strategy. Additionally, you will have the opportunity to use practical tools and participate in hands-on exercises that will reinforce your understanding and ability to implement what you've learned.

For a practical guide on making these crucial choices, watch "How to Choose the Best Social Media Platform for Your Business" [<https://www.youtube.com/watch?v=llUJDlz7p70>]. This brief video highlights key factors like audience identification, content formats, and aligning goals with platform strengths, offering clear insights for optimizing your social media presence.

Introduction to Digital Platforms

There are many different types of digital platforms available for organizations to use such as: social media networks, content management systems, email marketing services, and paid advertising platforms. Each of these platforms offers distinct advantages that can be aligned with specific marketing strategies. For instance, social media networks like Facebook and Instagram are excellent for reaching a broad audience and increasing brand awareness, while email marketing platforms are ideal for nurturing relationships and personalizing communication with your existing supporters.

Not every platform is suitable for every audience, and understanding the digital behaviors of your target audience is crucial for effective platform selection. You need to identify where your audience spends their time online, the type of content they engage with most, and their

preferred methods of communication. Are they more inclined to watch videos, or do they prefer reading articles? Younger demographics may prefer interactive and visual content found on platforms like TikTok and Instagram, while professionals may spend more time on LinkedIn.



Kiva, a non-profit organization that allows people to lend money to low-income entrepreneurs and students in over 70 countries, excels at fostering deep engagement through personalized email marketing.

Their strategy goes beyond simple newsletters; once a user makes a loan, Kiva provides consistent, detailed email updates on the borrower's progress, loan repayments, and ultimately, the successful impact of the loan. These personalized emails include stories and photos from the field, creating a strong emotional connection between the lender and the borrower. This tailored communication builds immense trust and reinforces the direct impact of each lender's contribution.

By demonstrating tangible results and celebrating successes, Kiva's email marketing significantly encourages repeat lending and strengthens community loyalty, turning one-time contributors into sustained supporters of their microfinance mission.

Each digital platform has its own characteristics and usage scenarios that make it suitable for different kinds of interactions. To maximize the impact of your campaigns, you must align the platform's characteristics with your SEO's goals.

1. **Facebook:** Remains one of the largest social networks, offering broad reach and diverse content formats (text, images, video, live streaming). It's excellent for building community, sharing longer-form updates, and running targeted fundraising campaigns due to its robust advertising tools. Many SEOs find success here for general awareness and donor engagement.
2. **Instagram:** Highly visual, best for storytelling through images and short videos (Reels, Stories). Ideal for SEOs with compelling visual content (e.g., environmental

organizations showcasing nature, aid groups sharing impact photos). It excels at building emotional connection and appealing to younger demographics.

3. **LinkedIn:** The premier platform for professional networking. Essential for SEOs seeking partnerships, corporate sponsorships, policy advocacy, recruitment of skilled volunteers, and thought leadership. It's less about mass audience reach and more about targeted B2B or B2G (Business-to-Government) engagement.
4. **Twitter (now X):** Fast-paced and text-heavy, excellent for real-time news dissemination, live event coverage, advocacy, and direct engagement with media, policymakers, and influencers. SEOs can use it for urgent calls to action or to participate in public discourse around their cause.
5. **TikTok:** Dominates short-form video content, highly effective for reaching Gen Z and younger Millennials. SEOs can use it for creative, engaging, and digestible educational content, behind-the-scenes glimpses, or viral challenges related to their mission. Its algorithm can offer significant organic reach for engaging content.
6. **Threads:** As a newer text-based platform integrated with Instagram, Threads offers an avenue for public conversations and quick updates. It can be useful for SEOs looking to engage in real-time discourse, share brief announcements, and connect with a potentially younger audience that values direct, conversational content, especially those already active on Instagram.
7. **YouTube:** The leading platform for long-form video content. Ideal for SEOs that produce educational videos, documentaries, testimonials, or event recordings. It's a powerful tool for building authority and providing in-depth information, as videos can also rank well in Google search results.
8. **Email Marketing Platforms (e.g., Mailchimp, Constant Contact):** Crucial for direct, personalized communication. Essential for nurturing donor relationships, volunteer recruitment, event invitations, and providing detailed updates. Unlike social media, you "own" your email list, providing a direct channel free from algorithm changes.
- 9.



Khan Academy, a non-profit educational organization, has masterfully leveraged YouTube as its primary platform to deliver free, world-class education to anyone, anywhere. Their core strategy revolves around creating an extensive library of short, engaging video tutorials that break down complex subjects into easily digestible lessons, ranging from mathematics and science to history and economics.

By consistently producing high-quality educational content and optimizing it for YouTube's search algorithms, Khan Academy ensures that millions of students, teachers, and lifelong learners can easily discover their videos when searching for specific topics. This strategic use of YouTube has not only made learning accessible globally but also established Khan Academy as a leading authority in online education, expanding their reach and impact far beyond traditional classroom settings.

Content-Type Considerations: practical scenario examples

The type of content you produce will greatly influence which platform is best for your organization. If your organization focuses on creating video content, platforms like YouTube or TikTok are ideal choices, as they specialize in video hosting and sharing. Alternatively, if you are sharing in-depth articles, thought leadership pieces, or insights, LinkedIn or a dedicated blog platform (often part of your website, utilizing a Content Management System like WordPress) may be more appropriate. Understanding how different types of content perform on each platform will allow you to target your audience more precisely and deliver content that resonates.

- **Scenario 1 - Raising Awareness for a New Initiative:** If your goal is to quickly spread awareness about a new community project targeting a broad public, consider platforms with high organic reach potential for engaging content, like TikTok (for viral short videos) or Facebook (for wider sharing and community groups). Simultaneously, think about a press release distributed via LinkedIn for professional stakeholders.
- **Scenario 2 - Recruiting Volunteers with Specific Skills:** For specialized volunteer recruitment (e.g., legal aid, medical professionals), LinkedIn is invaluable. You can directly target individuals by their profession, skills, and industry. Supplement this with targeted email campaigns to your existing network, outlining the specific skills needed.
- **Scenario 3 - Driving Donations for an Emergency Appeal:** In urgent situations, a multi-platform approach is best. Use social media (Facebook, Instagram, Twitter/X)

for rapid, emotionally compelling updates and calls to action. Simultaneously, deploy targeted email marketing to your donor list, providing direct links to donate. Paid advertising on social media can amplify reach to new potential donors quickly.

- **Scenario 4 - Educating the Public on a Complex Issue:** If your SEO deals with complex topics (e.g., climate change policy, public health research), YouTube is excellent for explainer videos and panel discussions. A blog on your website, optimized for search engines, allows for in-depth articles. Promote snippets of this content on LinkedIn for professional audiences and Instagram/TikTok for simplified, visual explainers.
- **Scenario 5 - Building a Long-Term Community:** Facebook Groups, dedicated forums on your website, or engaged Instagram comment sections can foster community. Regular, interactive content and consistent engagement from your team are key. Email newsletters can keep the community informed and active.

THE OCEAN CLEANUP

The Ocean Cleanup, an environmental engineering non-profit developing advanced technologies to rid the world's oceans of plastic, effectively uses Instagram to visually communicate its ambitious mission and tangible progress.

Given the inherently visual nature of ocean pollution and large-scale engineering projects, Instagram serves as the ideal platform for sharing captivating photos and videos of their innovative systems in action: from barges deploying collectors in the Great Pacific Garbage Patch to recovered plastic being brought ashore. By showcasing clear visual evidence of their operations, successes, and challenges, they translate complex technical work into understandable and inspiring updates.

This consistent visual storytelling fosters strong public engagement, builds credibility, and mobilizes a global community of supporters who can see the direct impact of their contributions towards a cleaner ocean.

Conclusion

Choosing the right digital platform is not merely about presence; it's a strategic decision that profoundly impacts your Social Economy Organization's ability to connect, engage, and achieve its mission. By thoroughly understanding your target audience's digital

behaviors, aligning your content types with platform characteristics, and setting clear organizational goals, you can make informed choices that maximize your digital marketing impact. The myriads of platforms, from visual storytelling hubs like Instagram and TikTok to professional networks like LinkedIn and direct communication tools like email, each offer unique advantages. Selecting them wisely allows SEOs to optimize their efforts, reach the right people with the right message, and ultimately amplify their positive social impact in an increasingly digital world.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

When selecting a digital platform, why is the Understanding of Audience Preferences considered a crucial step for SEOs?

- a) It helps determine the budget for paid advertising.
- b) It ensures the message reaches the audience effectively where they spend their time and with content they engage with.
- c) It prioritizes platforms with the largest global user base regardless of relevance.
- d) It helps choose platforms that require the least amount of content creation.

Question 2

An SEO aiming to recruit highly skilled volunteers or forge new corporate partnerships would most effectively leverage which platform, according to its primary characteristics?

- a) TikTok
- b) Instagram
- c) LinkedIn
- d) YouTube

Question 3

The example of The Ocean Cleanup effectively using Instagram highlights the importance of matching content type with platform strengths. What type of content did they primarily leverage on Instagram?

- a) Long-form research papers and policy documents.
- b) Short, engaging video clips and captivating photos of their operations.
- c) Detailed financial reports and budget breakdowns.
- d) Text-only announcements and press releases.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Paid social media advertising guide. <https://www.digivate.com/blog/ppc/paid-social-media-advertising-guide/> Accessed August 28, 2025
2. Social media for business marketing <https://www.alt-er.com/social-media-for-business-marketing/> Accessed August 28, 2025

Lesson 8

Creating an editorial plan

Expected reading time: 18 minutes

Main page content

Editorial planning is essential for ensuring consistency and coherence in digital marketing. It involves deciding what type of content to produce, how often to publish, and which platforms to use. Editorial plans provide a structured roadmap that aligns content production with your organization's marketing objectives.

Crucially, before creating an editorial plan, it is vital to clearly define your organizational goals. Are you striving to increase brand awareness? Promote specific programs or services? Engage your audience in ongoing activities, or drive donations for a particular cause? Understanding the core purpose of your content will directly guide the types of content you create and its publication frequency. Your content should always directly support the broader mission of your SEO: for example, an organization focused on community development might produce blog articles and videos showcasing the positive impact of their projects to attract new volunteers or donors.

For a practical guide on making these crucial choices, we propose the video "How to Create a Content Calendar (and What to Include!): <https://www.youtube.com/watch?v=6Qj6MN4ig44>. This video highlights key factors like audience identification, content formats, and aligning goals with platform strengths, offering clear insights for optimizing your content strategy.

Introduction to Editorial Planning

A strategic editorial calendar is key to your content process, offering a comprehensive overview of your content pipeline and ensuring every piece serves a purpose. Here is an overview of some relevant tools that can offer diverse functionalities to help SEOs in managing their editorial plans, from simple scheduling to complex project management:

1. **Google Calendar:** A free and accessible tool ideal for basic content scheduling. You can create dedicated calendars for different content streams (e.g., social media

posts, blog articles, email newsletters), assign distinct color codes for content types or platforms, and share these calendars with team members for collaborative viewing. Its simplicity makes it excellent for visualizing deadlines and ensuring a consistent content flow without a steep learning curve.

2. **Trello:** A highly visual project management tool that uses a Kanban-style approach with boards, lists, and cards. For an editorial plan, you can set up a board with lists representing stages of content production (e.g., "Ideas," "Drafting," "Review," "Scheduled," "Published"). Each "card" can represent a piece of content, detailing its topic, assigned team member, due date, content type, and attachments like draft documents or images. This provides a clear, collaborative workflow for content creation.
3. **Notion:** A versatile all-in-one workspace that functions as a sophisticated note-taking app, database, wiki, and project management tool. For an editorial plan, Notion excels at creating highly customizable databases. You can set up properties for content type, platform, publication date, status, author, target audience, and even embed full content briefs or draft text. Its ability to switch between calendar, table, and Kanban views allows teams to manage their content pipeline in a way that best suits their preferences.
4. **HubSpot Content Calendar Template:** While HubSpot offers a robust, paid marketing platform, they also provide free content calendar templates (often in spreadsheet or downloadable formats like Excel or Google Sheets). These templates are meticulously designed to guide you through planning your topics, associated keywords, calls to action, distribution channels, and performance metrics. They are particularly useful for those new to structured content planning, offering a comprehensive framework without requiring an investment in the full platform.

Types of Content and Content Calendar

Your editorial plan should include a variety of content types: blogs, social media posts, videos, newsletters, infographics, and more. Each content type serves a different purpose, such as educating your audience, entertaining them, or prompting them to take action.

The content calendar serves as the backbone of your editorial plan. It helps track content production, ensures timely publication, and coordinates efforts across different team members. Beyond just planning, tools are essential for the efficient execution and timely publication of your social media content from your editorial calendar:

- **Sprout Social:** A comprehensive social media management platform that allows you to schedule posts across multiple platforms (Facebook, Instagram, Twitter/X, LinkedIn, TikTok, etc.), monitor mentions, engage with your audience, and analyze performance from a single dashboard. It's particularly strong for team collaboration, unified inboxes for messages, and robust reporting, making it ideal for SEOs managing multiple social channels and team members.
- **Later:** Highly popular for its visual content planning capabilities, especially for Instagram. Later allows users to visually plan their Instagram grid, schedule posts (including single images, carousels, Stories, and Reels), and offers useful features like a link-in-bio tool and hashtag suggestions. It's an excellent choice for SEOs whose strategy relies heavily on visual storytelling and building an aesthetic brand presence.
- **Hootsuite:** One of the oldest and most widely used social media management tools, Hootsuite offers broad functionality for scheduling posts to various networks, monitoring conversations (through customizable "streams" for keywords, mentions, and hashtags), and generating reports. Its ability to manage multiple social profiles and listen to real-time discussions makes it versatile for SEOs engaged in advocacy, rapid response communication, or managing a diverse portfolio of social channels.

Frequency and Timing

Maintaining an optimal publishing frequency is crucial for keeping your audience engaged, but it should always be balanced with the **quality** of the content produced. It is far more effective to create high-quality, valuable content less frequently than to overwhelm your audience with low-value, repetitive, or poorly executed posts. An inconsistent flood of mediocre content can quickly lead to audience fatigue, unsubscribes, and a decline in overall engagement and trust.

Understanding the "when" is just as important as the "how often." You need to consider the timing of your posts to align with your audience's online behavior: when are they most active, and when are they most receptive to your message? Analytics tools from platforms like Google Analytics, Facebook Insights, or email marketing services are invaluable for identifying these peak times.

Here are some examples of how different socially oriented organizations around the world optimized their content schedule to maximize engagement:

The Nature Conservancy

Quality over Quantity in Blogging: The Nature Conservancy consistently publishes in-depth, scientifically backed articles and reports on their blog. Rather than daily or weekly short posts, their strategy focuses on fewer, but highly authoritative, pieces that attract researchers, policymakers, and dedicated environmentalists. This approach builds a strong reputation as a trusted resource, leading to higher organic search rankings and deeper engagement from a specific, influential audience, demonstrating that less frequent, high-quality content can be profoundly impactful.



Timely Social Media Updates for Transparency: known for its commitment to transparency, Charity: Water strategically times its social media and email updates to coincide with project milestones. When a well is completed or a community gains access to clean water, they swiftly share compelling visual content and stories from the field across Instagram and Facebook. This timely delivery of impact updates maximizes donor excitement and trust, reinforcing the direct result of contributions and encouraging immediate, positive engagement.



Optimized Email Cadence for Diverse Donors: As a large hunger-relief organization, Feeding America utilizes a sophisticated email marketing strategy that varies in frequency based on donor segmentation and campaign urgency. While general awareness emails might be sent bi-weekly, major donors or those who have just contributed might receive more personalized, frequent updates detailing the impact of their specific donations. During peak fundraising seasons (like year-end or disaster relief efforts), email frequency increases across all segments, strategically timed for maximum giving potential, showing that frequency is dynamic and purpose-driven.



Event-Driven Content Surges: This organization, providing bicycles to empower people in developing regions, masterfully executes content surges around key fundraising events like Giving Tuesday or their annual appeal. Their editorial plan includes a significant ramp-up of social media posts, email campaigns, and website banners in the weeks leading up to these events, culminating in intense, real-time engagement on the day itself. This focused, high-frequency push within specific windows leverages public giving trends and generates a substantial portion of their annual donations.

Leveraging AI and Prompts for Editorial Planning

Artificial Intelligence, particularly large language models (LLMs) like ChatGPT or GEMINI, can be powerful allies in streamlining and enhancing your editorial planning process. Instead of replacing human creativity and strategic thinking, AI can act as a sophisticated brainstorming partner, content drafting assistant, and efficiency booster.

Here is a list of specific prompts that SEOs can use to initiate a conversation with a LLMs on the topic of content development and planning:

- **Brainstorming Content Ideas & Themes:**
 - Prompt Example: "Generate 10 unique blog post ideas for a non-profit focused on sustainable urban gardening, targeting city dwellers interested in local food, including calls to action for volunteer sign-ups."
- **Drafting Content Outlines and Structures:**
 - Prompt Example: "Create a detailed outline for a 3-minute Instagram Reel script explaining the benefits of composting for urban communities, ending with a call to action to download our composting guide."
- **Generating Multiple Variations for A/B Testing:**
 - Prompt Example: "Write 5 different social media captions (short, medium, long) for a fundraising post about providing clean water in [specific region], targeting young adult donors. Include emojis and a strong call to action to donate. Also provide 3 alternative headlines for the associated donation page."
- **Tailoring Content for Specific Audience Segments:**
 - Prompt Example: "Rewrite this press release about our new youth mentorship program for two different audiences: 1) local parents on Facebook, using empathetic and community-focused language; 2) corporate partners on LinkedIn, emphasizing impact metrics and partnership opportunities."
- **Keyword and Hashtag Research:**
 - Prompt Example: "Suggest 15 relevant hashtags for an Instagram post about mental health support for teenagers, including a mix of popular and niche tags. Also, list 5 long-tail keywords for a blog post on accessible mental health services."

However, it's crucial to remember that AI-generated content still requires thorough human review for accuracy, factual correctness, appropriate tone, adherence to brand voice, and, most importantly, ethical considerations specific to SEOs. AI is a powerful tool to enhance efficiency and creativity, not to replace the nuanced understanding and empathy vital to

your organization's mission and audience. For a practical guide on using AI to assist with your editorial plan, explore resources like "How to write a social editorial plan for a business page with GPT Chat".

Conclusion

Creating a well-structured digital editorial plan is not just about organizing tasks; it's about giving strategic direction to your Social Economy Organization's entire digital presence. By meticulously planning your content, you ensure consistency, maintain relevance, and align every piece of communication directly with your organizational goals.

This lesson has highlighted the critical importance of understanding your audience, leveraging diverse content types, and utilizing practical tools like content calendars and scheduling platforms to streamline your efforts. Furthermore, it underscored the necessity of strategically balancing frequency with quality and leveraging insights from AI tools to enhance your planning efficiency.

Ultimately, a robust editorial plan empowers SEOs to tell their stories more effectively, engage their communities consistently, and drive meaningful action, all while maximizing limited resources. By embracing this structured approach, your organization can build stronger connections, amplify its impact, and secure its vital role in the digital landscape.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary benefit of creating a digital editorial plan for an SEO?

- a) To completely automate all content creation without human oversight.
- b) To ensure consistency, coherence, and alignment of content with the organization's mission and goals.**
- c) To exclusively focus on increasing advertising revenue through paid promotions.
- d) To eliminate the need for any audience analysis before content creation.

Question 2

Which of the following sets includes tools primarily designed for *managing content workflow* and *scheduling social media posts* within an editorial plan, as discussed in the lesson?

- a) Google Analytics, SEO tools, and email client software.
- b) Trello, Sprout Social, and Hootsuite.**
- c) Photoshop, Premiere Pro, and graphic design software.
- d) Spreadsheet software, word processors, and presentation tools.

Question 3

When leveraging AI for editorial planning, which of the following is highlighted as a crucial human responsibility for SEOs?

- a) Allowing AI to autonomously publish all content without review.
- b) Relying solely on AI to generate all content ideas and execute campaigns.
- c) Thorough human review for accuracy, tone, brand voice, and ethical considerations specific to the SEO's mission.**
- d) Eliminating all human involvement in content creation to save costs.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

5. 7 steps towards a more strategic editorial calendar
<https://contentmarketinginstitute.com/content-optimization/7-steps-to-a-more-strategic-editorial-calendar> Accessed September 12, 2025
6. Using prompts to create an editorial plan <https://frontiere.io/how-to-write-a-social-editorial-plan-for-a-business-page-with-gpt-chat/> Accessed September 12, 2025

Lesson 9

Exploiting paid social media advertising

Expected reading time: 18 minutes

Main page content

The objective of this lesson is to empower you to effectively create and manage paid advertising campaigns that serve your social mission. For Social Economy Organizations (SEOs), paid advertising is not merely a marketing tactic; it is a powerful strategic tool to amplify your impact, attract supporters, and drive social change in a digital-first world.

In essence, an ad is a paid message or content designed to persuade an audience to take a specific action. The power of digital advertising lies in its ability to deliver these messages directly to your target audience with unprecedented precision. Unlike traditional marketing methods, such as printing flyers or running a local ad in a newspaper, digital advertising allows you to bypass geographical and demographic limitations to reach people who are most likely to care about your cause, regardless of where they are. While organic marketing (e.g., sharing a post on your Facebook page) relies on your existing audience and a platform's algorithm, paid advertising ensures your message is seen by a new, targeted audience, providing a guaranteed reach that can be scaled up or down according to your needs and budget.

Before starting, we recommend watching this youtube video on how to master social media advertising:

https://www.youtube.com/watch?v=ol0v779BIAA&ab_channel=HubSpotMarketing

By the end of this lesson, you will be able to design and optimize a paid advertising strategy that fits your organizational goals and budget, ensuring every euro spent translates into tangible value.

Choosing the Right Platform to invest on



For SEOs, paid advertising is fundamentally different from a commercial business. A traditional company uses ads to drive sales and maximize profit. An SEO, on the other hand, uses ads to generate social impact—whether that means recruiting volunteers, raising awareness for a social cause, or securing funding for a project. This requires a unique approach to messaging and targeting, focusing on storytelling and emotional connection over a purely transactional exchange. The most common platforms for paid advertising include Google Ads, Meta (Facebook and Instagram Ads), LinkedIn Ads, and TikTok Ads

Selecting the correct platform is the first critical step. Each platform has a unique audience and ad format, making it essential to align your choice with your specific goals. **Moreover, most of the platforms offer specific grant or donation based programs.**

- **Google Ads:** This platform is ideal for search-based campaigns, as it helps you reach users who are actively looking for information or services related to your cause. You can use text-based ads that appear at the top of Google search results. For example, a social cooperative offering vocational training for marginalized youth could target keywords like "job skills training for youth" or "vocational education programs."
 - **Google Ad Grants,** a program that provides eligible nonprofits with free advertising credits to use across Google's platforms (including ads that can integrate with YouTube campaigns). Google Ad Grants gives nonprofits up to US \$10,000 of in-kind advertising every month to run search ads that drive awareness, website visits, volunteer sign-ups, and donations
- **Meta Ads (Facebook & Instagram):** These platforms are perfect for building community and emotional connections. With a vast user base, Meta's targeting capabilities allow you to reach people based on their interests, demographics, and behaviors. Ads on these platforms are highly visual, making them perfect for sharing success stories, highlighting the people you serve, and showcasing your organization's impact through engaging photos and videos.
- **LinkedIn Ads:** This is the premier platform for B2B engagement and professional networking. If your SEO seeks corporate partnerships, sponsorships, or skilled volunteers, LinkedIn allows you to target specific companies, industries, or job titles. It's the ideal place to promote thought leadership content, such as whitepapers or webinars, that can attract high-value partners.
- **TikTok Ads:** A rapidly growing platform, TikTok is dominated by short-form video content, making it the best choice for reaching younger demographics (Gen Z and millennials). The platform's algorithm rewards authenticity and creativity. SEOs can use TikTok ads to launch viral challenges, share behind-the-scenes glimpses of their work, or create engaging and humorous content that simplifies a complex social issue.

- **TikTok for Good** is TikTok's initiative to help nonprofits and goal-driven organizations amplify their social impact through the platform. It combines TikTok's creative tools with fundraising and awareness-raising opportunities.
- **YouTube Giving** is part of the YouTube Nonprofit Program and includes a suite of fundraising tools built directly into YouTube. It allows nonprofits (and some individual creators in partnership with nonprofits) to collect donations right from their video content.

Consider using an **all-in-one tool** like Metricool, which consolidates data from multiple social media platforms and paid ad campaigns, giving you a comprehensive view of your audience across different channels.

Tools to help you with content creation

Managing multiple ad campaigns can be complex, but a variety of tools can help streamline the process and make your efforts more efficient. These tools can be categorized by their function, from creative production to comprehensive management.

- **Design and Content Creation:** A visually appealing ad is key to capturing attention. Canva is an indispensable tool for creating professional-looking visuals, even without a design background. Its user-friendly interface and vast library of templates allow you to quickly produce high-quality images and short videos for platforms like Meta and TikTok. For video-specific editing, CapCut is a powerful and free mobile app that is perfect for creating dynamic, short-form video content that feels native to TikTok and Instagram Reels. Its features like trending sounds, effects, and text overlays can significantly boost your ad's engagement.
- **Audience and Keyword Research:** Before you even launch a campaign, understanding your audience is crucial. Google Keyword Planner is a free tool that helps you discover keywords related to your mission, giving you insight into what people are searching for. This is vital for creating effective Google Ads. For social platforms, a tool like Meta Business Suite (which includes Meta Ads Manager) provides in-depth audience insights, allowing you to analyze demographics, interests, and behaviors of your followers and potential new audiences.
- **All-in-One Management Platforms:** For SEOs managing multiple social media accounts, an all-in-one platform can be a game-changer. Hootsuite and Sprout Social are two leading examples that allow you to manage, schedule, and monitor content and ad performance across all your social media accounts from a single dashboard. These platforms offer powerful analytics to track your key metrics, and

some even provide social listening capabilities, which help you understand how your paid campaigns are impacting broader conversations about your cause

Strategic Budgeting and Allocation for Maximum Impact

Budgeting for paid ads requires a strategic mindset, not just a set amount of money. For SEOs, the goal is to maximize your social ROI (Return on Investment).

- Start Small and Test:** Don't allocate your entire budget at once. Begin with a small, test budget (e.g., €50-€100) to run a few different campaigns. This allows you to gather data on what works before committing a larger sum. Use A/B testing to compare different ad creatives, headlines, or target audiences to see which delivers the best results.
- Allocate Based on Performance:** Once your test campaigns have run, analyze the data. Reallocate more of your budget to the campaigns and platforms that generate the best results for your goals. For example, if your Facebook ad for a donation drive has a lower Cost Per Acquisition (CPA) than your Google ad, shift more funds to Facebook.
- Consider a Multi-Platform Approach:** Your budget doesn't have to be on a single platform. A smart strategy is to use a small budget on multiple platforms to reach different audiences. You might use Google Ads to attract people actively searching for a service and a smaller budget on TikTok to build brand awareness with a younger audience.

Hereby are three examples of successful social media campaign:



The Challenge: The British Heart Foundation (BHF), a leading UK charity, needed to raise awareness and drive donations, but their brand name was so broad that their search

results were often buried. They needed a way to reach people actively seeking information about heart health.

The Strategy: BHF leveraged a Google Ad Grant to run text-based campaigns. They targeted keywords related to "heart disease," "CPR training," and "healthy living advice." Their ads provided a direct link to their informational resources and donation pages, all at no cost.

The Result: This strategy significantly increased organic traffic to their website, driving thousands of new users who were actively seeking their expertise. The free ad credits allowed BHF to maintain a strong presence in the search results and connect with a highly relevant audience, proving how powerful this resource can be for non-profits.



The Challenge: The Ocean Cleanup, a non-profit developing advanced technologies to rid the world's oceans of plastic, wanted to grow its global supporter base and secure donations. Their mission is highly visual and inspiring, which made it a perfect fit for a storytelling platform.

The Strategy: The organization launched a series of highly visual ad campaigns on Facebook and Instagram. They used emotionally compelling videos and images showing their technology in action and the impact of plastic pollution. The ads included clear calls to action, such as "Support the Mission" and "Donate to Clean Our Oceans." They targeted audiences interested in environmental conservation, climate change, and marine life.

The Result: The campaigns went viral, generating millions of views and engagement. This resulted in a massive influx of new donors and followers from around the world. The ads successfully translated a complex engineering project into a compelling, human story that people felt compelled to support.



The Challenge: Bat Conservation International (BCI), a non-profit dedicated to protecting bats, needed to reach a younger, more global audience to raise awareness about the ecological importance of bats and combat misinformation. They had a limited presence on traditional social media.

The Strategy: BCI embraced TikTok's community-driven nature. Instead of formal advertisements, they ran "Spark Ads," which are a form of paid ad that promotes existing, high-performing organic content from a creator or a brand's own account. BCI's team created short, educational, and often humorous videos using trending sounds and formats to debunk myths about bats and show how fascinating they are. They used hashtags like #BatTok and #LearnOnTikTok to embed themselves in existing communities and piggyback on popular educational content.

The Result: BCI's videos generated millions of views and their TikTok account grew rapidly. They saw a significant increase in website traffic from a younger demographic, and the campaign successfully shifted public perception of bats from scary creatures to vital parts of the ecosystem. The low-cost, high-authenticity approach of TikTok ads proved to be a perfect fit for their awareness-building goals.

Conclusion

Paid advertising is an essential skill for any SEO looking to thrive in the digital age. By strategically using platforms like Google, Meta, and LinkedIn, you can bypass the limitations of organic reach and connect directly with the people who are most likely to support your mission. Remember to approach your campaigns with a clear purpose, a modest starting budget, and a commitment to data-driven decision-making. By leveraging these tools effectively, you can ensure your message is not only heard but also acted upon, leading to a greater and more sustainable social impact.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary difference in the objective of paid advertising for a Social Economy Organization (SEO) compared to a commercial business?

- A. SEOs focus on generating brand awareness, while commercial businesses focus on increasing website traffic.
- B. SEOs use paid ads to generate social impact in addition to making profits, while commercial businesses use them only to maximize profit.**
- C. SEOs use Google Ads exclusively, while commercial businesses use social media ads.
- D. There is no difference; both use paid advertising to increase sales and market share.

Question 2

A SEO wants to use paid advertising to attract corporate partners and sponsors for a new project. Which of the following platforms would be the most effective for this goal, and why?

- A. TikTok Ads, because its short-form video content can go viral and reach a mass audience.
- B. Meta Ads (Facebook & Instagram), because their visual storytelling is best for emotional connection.
- C. Google Ads, because they are best for reaching people who are actively searching for solutions.
- D. LinkedIn Ads, because they allow for precise targeting of professionals and businesses by industry and job title.**

Question 3

A SEO launches a fundraising campaign on social media and wants to measure its true effectiveness. Beyond simple metrics like clicks and impressions, what is a key, SEO-specific KPI they should track to assess their social return on investment (ROI)?

- A. Click-Through Rate (CTR)
- B. Cost Per Acquisition (CPA)**
- C. Cost Per Click (CPC)
- D. Impressions

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Paid advertising, how to <https://www.semrush.com/blog/paid-advertising/> Accessed September 12, 2025
2. Paid social by Shopify <https://www.shopify.com/blog/paid-social> Accessed September 12, 2025
3. 101 The Must Know Secrets to Social Media Marketing for Nonprofits.
<https://www.youtube.com/watch?v=EmsLeu-gGmo>

Lesson 10

Defining your target audience

Expected reading time: 14 minutes

Main page content

The objective of this lesson is to empower you to identify and define your target audience for digital marketing. Understanding your audience is not just a best practice; it is the cornerstone of any successful campaign, allowing you to tailor your messages, choose the right platforms, and create content that resonates deeply with your audience. As a Zendesk report found, 68 percent of consumers expect all experiences to be personalized. But how can you achieve that if you don't know who you're catering to? By the end of this lesson, you will be able to define your target audience clearly, align your marketing efforts accordingly, and create more engaging and impactful campaigns that lead to real social change.

The foundation for this work is understanding why audience definition matters for SEOs. Defining your target audience involves identifying the specific group of people most likely to be interested in your mission and values. For Social Economy Organizations (SEOs), this means pinpointing individuals who are motivated to support a cause, volunteer their time, or purchase a product that aligns with their beliefs. The more precisely you can define your audience, the better you can create marketing campaigns that speak directly to their needs and motivations, moving them from passive observers to active supporters.

Before delving into the lecture, we recommend watching this youtube video to briefly understand what a target audience is: https://www.youtube.com/watch?v=PFa_mRLRsmQ&ab_channel=MarketingExplained

Understanding your audience

To truly understand your audience, you must look beyond simple characteristics and consider their underlying motivations. The "Jobs to Be Done" (JTBD) theory, developed by Harvard Business School Professor Clayton Christensen, offers a powerful framework for this. The theory posits that customers don't simply buy products; they "hire" a product or service to get a "job" done in their lives. This "job" is the progress they are trying to make, a problem they are trying to solve. For SEOs, this means asking: "What job is a supporter hiring my organization to do?" They might not be "donating to a charity," but rather "hiring" your

organization to: feel a sense of purpose and make a positive impact, connect with a community of like-minded individuals, gain a new skill through volunteering or a workshop, or alleviate a feeling of helplessness about a social issue. By understanding these motivations, you can tailor your messaging to highlight the emotional and social "job" your organization is hired to do.

Building a comprehensive picture of your audience requires collecting and analyzing different types of data. According to a HubSpot survey, 82 percent of marketers say high-quality customer data is crucial for success. You should focus on three key categories. Demographic Data is the most basic information about your audience, including age, gender, location, education, and occupation. It provides a broad understanding of who you are reaching, but demographics alone do not explain *why* people support you. Behavioral Data focuses on actions your audience takes. Examples include website interaction habits, purchase history, newsletter open rates, or the types of social media content they engage with. Analyzing this data helps you understand *how* your audience interacts with your digital channels. Motivational Data is the most critical and often the most challenging data to collect. It focuses on your audience's deeper needs and the "jobs" they are trying to get done. Motivations can include a desire for convenience, value, or a sense of community. This data explains *why* your audience chooses to engage with you over others.

Once you have gathered data, the next step is to create marketing personas. A persona is a semi-fictional representation of your ideal supporter, volunteer, or customer, based on the data you've collected. Personas help you visualize who you are trying to reach and humanize your target audience.

Here follows an example of a personas canvas:



NAME
Shannon

LOCATION
Omaha, NE

AGE
19

EDUCATION
Biology Major

TITLE
Student at University

Savvy Spender Shannon

Shannon is a bright and ambitious freshman juggling a heavy course load with a part-time job at the campus bookstore. She's financially independent from her parents but relies on them for occasional support. She's tech-savvy and manages her money through budgeting apps.

GOALS

- Earn good grades and get into medical school.
- Manage her finances effectively and avoid debt.
- Build a strong credit score for the future.

CHALLENGES

- Balancing schoolwork with a part-time job.
- Sticking to a budget with limited income.
- Understanding complex financial products.

NEEDS

- A user-friendly mobile banking app with budgeting tools.
- Educational resources on managing finances and building credit.
- No-fee checking accounts with student discounts.
- Debit cards with purchase rewards or cashback programs.

QUOTES

- "I need a bank that makes managing my money easy, even with my crazy schedule."
- "I'm worried about student loans, but I don't want to get stuck with unnecessary credit card debt."
- "I want to be smart about my finances now so I don't have problems later in life."

Methods for Audience Research

To build these comprehensive personas, you need to use both quantitative and qualitative research methods. Qualitative research uncovers the "why" and provides rich, contextual insights. You can gather this data through interviews with current, former, and even non-supporters, asking pointed questions about their motivations. You can also use observation to analyze online behaviors, looking at social media comments or forum discussions to understand the questions people are asking and the problems they're trying to solve.

Qualitative Research: The "Why"

Qualitative research is about understanding motivations, feelings, and the stories behind the data. It's the best way to uncover the "why" and gain deep, contextual insights into your audience. Instead of numbers, you'll be gathering words, opinions, and detailed feedback.

- **One-on-One Interviews:** Conducting personal interviews with a small group of supporters, volunteers, or beneficiaries can uncover invaluable information. For example, a social enterprise that trains people in coding might interview a handful of its graduates to understand their initial anxieties, what motivated them to sign up,

and what "job" they were hiring the program to do (e.g., "to get a better job" or "to feel a sense of professional purpose").

- **Focus Groups:** Similar to interviews, focus groups bring a small, diverse group of people together for a guided discussion. This method is great for observing group dynamics and seeing how people's opinions are shaped by others. A non-profit focused on mental health could run a focus group with young adults to understand their perceptions of mental health and the language they use to discuss it.
- **Social Listening:** This involves monitoring social media comments, online forums, and review sites to see what people are saying about your cause, your competitors, or your organization. It's a non-invasive way to get unfiltered, authentic feedback. For example, a food bank could monitor online discussions about food waste to understand the conversations and motivations of people who might become volunteers.



Qualitative Research: Mind

The Challenge: Mind, a mental health charity, wanted to launch a campaign to combat loneliness, but they needed to understand the specific experiences and language of people feeling isolated. They knew that a generic campaign wouldn't resonate.

The Strategy: Mind conducted a series of in-depth, one-on-one interviews and focus groups with individuals who had experienced loneliness. They asked open-ended questions to uncover the emotional "why" behind their feelings, the daily challenges they faced, and what kind of support they truly needed. This qualitative data revealed that loneliness wasn't just about being alone; it was about feeling disconnected even when surrounded by people.

The Result: The research directly shaped their "Loneliness isn't always being alone" campaign. The messaging and visuals, which featured real stories and authentic

language, resonated deeply with their target audience, leading to significant engagement and an increase in people seeking support

Quantitative Research: The "What"

Quantitative research provides the "what"—the numerical data that gives you a broad, measurable understanding of your audience. This method helps you identify patterns, trends, and demographics across a large group of people.

- **Web Analytics:** Tools like Google Analytics provide hard numbers on your website visitors. You can see their demographics (age, gender), where they came from (social media, search), and what they do on your site (pages visited, time spent, conversions). For an SEO, this data is essential for understanding which content is most popular and which campaigns are driving the most traffic.
- **Surveys:** Using tools like Google Forms or SurveyMonkey, you can create structured questionnaires to gather data from a large number of people. You can use multiple-choice, rating scales, or yes/no questions to easily analyze the results. For example, an organization promoting sustainable tourism could send a survey to its email list to find out which European countries its audience is most interested in visiting, allowing them to tailor future content and campaigns.
- **Social Media Insights:** Platforms like Meta Insights or TikTok Analytics provide rich data on your followers. You can see their age, location, and the type of content they engage with most. This helps you confirm or challenge assumptions about your audience. For instance, an SEO promoting local community events might use these tools to discover that its biggest following is in a neighboring city, prompting them to expand their geographical reach.



Quantitative Research: Patagonia

The Challenge: Patagonia wanted to understand if their customers' environmental values were directly linked to their purchasing habits. They needed to know which specific campaigns and products resonated most with their eco-conscious audience.

The Strategy: Patagonia used extensive web analytics and email marketing data to track customer behavior. They analyzed metrics such as purchase frequency of recycled products, click-through rates on their environmental activism emails, and the most-viewed pages on their "Worn Wear" used-apparel site. This quantitative data allowed them to segment their customers into distinct groups, such as "Active Activists" versus "Casual Consumers."

The Result: The data confirmed a strong correlation between engagement with their environmental content and purchases. This insight allowed Patagonia to allocate more of its marketing budget to their environmental campaigns and create more targeted communications, which strengthened brand loyalty and increased sales.

Conclusion

Having thoroughly explored the methods for audience research, we can conclude that a deep understanding of your audience is the single most important factor for an impactful digital marketing strategy. By using a combination of quantitative data from web analytics and surveys to identify broad trends and qualitative data from interviews and social listening to uncover motivations, you can move beyond simple assumptions. This dual approach allows you to understand not only *what* your audience does, but also *why* they do it, which is the key to creating content that resonates and drives meaningful engagement.

Verification of the participant's understanding

Format: **Scenario Simulation**

Scenario: You are the digital marketing manager for a social economy organization that focuses on promoting community-based renewable energy projects. Your task is to create a digital marketing strategy that effectively targets three key audience segments: local households, corporate stakeholders, and young environmental enthusiasts.

Steps for Evaluation:

1. Based on the provided scenario, segment your audience into three groups (local households, corporate stakeholders, and young environmental enthusiasts). Define the key characteristics of each segment, such as demographics, interests, and preferred platforms.
2. Create a marketing persona for each segment. Include key details like demographics, goals, challenges, content preferences, and the platforms they are most active on. For example, create a persona like "Sarah, a 29-year-old professional passionate about sustainability, who frequently uses Instagram and LinkedIn to stay informed about green initiatives."
3. Describe the type of content that would resonate with each audience segment. For instance, you might choose to create short, impactful videos for young environmental enthusiasts on Instagram, while preparing detailed case studies on renewable energy impact for corporate stakeholders on LinkedIn.
4. Identify which platforms are best suited for each segment and explain why. Explain your rationale for selecting a platform, such as using Facebook to connect with local households due to its community-building capabilities.
5. After presenting your personas, content types, and platform choices, use peer or instructor feedback to adjust your strategy. Reflect on how these changes improve your ability to engage your audience.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. HBS. Identifying customer needs <https://online.hbs.edu/blog/post/methods-for-identifying-customer-needs> Accessed September 12, 2025
2. HBS. Target audience in marketing <https://online.hbs.edu/blog/post/methods-for-identifying-customer-needs> Accessed September 12, 2025



Lesson 11

Understanding key GDPR requirements for digital marketing

Expected reading time: 12 minutes

Main page content

The objective of this lesson is to help you understand the implications of the General Data Protection Regulation (GDPR) for social economy organizations engaged in digital marketing. GDPR compliance is essential for ensuring that your organization handles personal data ethically and legally, maintaining the trust of your stakeholders and avoiding hefty penalties. This lesson will guide you through the key GDPR requirements, data handling practices, and how to implement these principles into your marketing activities. By the end of this lesson, you will be able to understand the core concepts of GDPR, align your marketing strategies with data protection principles, and apply best practices to ensure compliance while running effective digital campaigns.

Before delving into the lecture, we recommend watching this short youtube video which explain the core ideas behind GDPR: https://www.youtube.com/watch?v=j6wwBqfSk-o&ab_channel=TheWallStreetJournal

Core Principles of GDPR

The General Data Protection Regulation (GDPR) is a comprehensive data protection law implemented by the European Union in 2018. It was designed to protect the personal data and privacy of individuals in the EU and EEA. GDPR is built on seven core principles that organizations must adhere to:

- **Lawfulness, fairness, and transparency:** Data processing must have a lawful basis and be conducted in a fair and transparent manner. Individuals must be clearly informed about what data is being collected and why.
- **Purpose limitation:** Data should only be collected for a specific, explicit, and legitimate purpose.
- **Data minimization:** You should only collect the data that is absolutely necessary for your stated purpose.
- **Accuracy:** Personal data must be accurate and kept up to date.

- *Storage limitation:* Data should not be stored for longer than is necessary.
- **Integrity and confidentiality:** Data must be processed in a manner that ensures its security, protecting it from unauthorized access or breaches.
- **Accountability:** Organizations must be able to demonstrate their compliance with all of these principles.

Ultimately, for SEOs, GDPR is not just a legal hurdle; it's an opportunity to build trust and demonstrate your ethical commitment to your community.

Lawful Basis for Processing Personal Data

Under GDPR, every time you collect and use personal data for a digital marketing activity, you must have a lawful basis for doing so. While many assume consent is the only option, there are six lawful bases, and understanding them is crucial for effective compliance.

- **Consent:** This is the most common basis for marketing activities. Consent must be freely given, meaning a person is not coerced; specific, so they know exactly what they are consenting to; informed, providing clear information about data use; and unambiguous, requiring an active opt-in.
- **Contract:** Processing data is necessary to fulfill a contract with the individual. An SEO that sells products must process customer data to fulfill and ship the order.
- **Legal Obligation:** Processing is necessary to comply with the law, such as sharing financial data with tax authorities.
- **Vital Interests:** Processing is necessary to protect someone's life. This is rarely used in a digital marketing context but is a lawful basis for emergency situations.
- **Public Task:** Processing is necessary to perform a task in the public interest or to exercise official authority. This applies primarily to public sector bodies.
- **Legitimate Interest:** This is a crucial and nuanced basis for SEOs. It can be used when you process data for your organization's legitimate interests, provided that these interests do not override the fundamental rights and freedoms of the individual. For example, sending an email to a long-term donor about an upcoming fundraising event might be justified under legitimate interest, as it is a core part of your mission. However, you must always conduct a Legitimate Interest Assessment (LIA) to ensure you are acting responsibly and can prove your lawful basis if needed.
-

SAMARITANS

The Challenge: The Samaritans, a UK-based charity providing a helpline for people in distress, wanted to use digital advertising to reach new volunteers. They needed to ensure their Facebook ad campaigns were GDPR compliant, especially when creating custom audiences from their email lists.

The Strategy: Before uploading any data to Meta, the Samaritans' team confirmed that every person on the list had given explicit consent for their data to be used for marketing purposes. Their privacy policy clearly stated that data might be used to target them with ads. When they created a custom audience, they also created a "lookalike audience" based on this compliant dataset, ensuring the new audience was found using data that originated from a lawful basis.

The Result: The Samaritans were able to run effective, highly targeted recruitment campaigns with the full assurance that they were operating within GDPR guidelines, protecting both their brand reputation and the privacy of their supporters.

Rights of the Data Subject

GDPR grants individuals several powerful rights regarding their personal data, and SEOs must have clear, accessible processes in place to honor them. These rights empower individuals to have control over their own data.

- **Right to Be Informed:** Individuals have a right to know what data you are collecting and how it will be used. This is achieved through clear privacy policies and notices on all data collection forms.
- **Right of Access:** An individual can request a copy of all the personal data you hold on them, free of charge.
- **Right to Rectification:** They can request that inaccurate or incomplete data be corrected.

- **Right to Erasure (Right to be Forgotten):** An individual can request that their data be permanently deleted from your records. You must comply promptly with such requests.
- **Right to Restrict Processing:** An individual can request a temporary stop to the processing of their data in certain situations.
- **Right to Data Portability:** They can request their data in a commonly used, machine-readable format to transfer it to another service.
- **Right to Object:** An individual can object to the processing of their data for specific purposes, such as direct marketing.
- **Rights Related to Automated Decision-Making:** Individuals have a right not to be subject to a decision based solely on automated processing.

Data Protection by Design and by Default

A core principle of GDPR is Data Protection by Design and by Default. This means that data protection and privacy measures must be built into your systems and processes from the very beginning, not added as an afterthought. It's a proactive approach that ensures privacy is a fundamental consideration in all your digital marketing tools and campaigns.

- **Data Minimization:** This principle requires you to collect only the personal data that is absolutely necessary for your purpose. For a newsletter sign-up, for example, you likely only need an email address, not a phone number or home address.
- **Security:** Your systems must be secure against unauthorized access and data breaches. This includes using encryption, strong passwords, and two-factor authentication on tools that handle personal data. It also means ensuring that any third-party marketing tools you use (like your CRM or email provider) are also GDPR compliant.
- **Privacy by Default:** This means that the default settings on any new digital tool or service should be the most privacy-friendly option. For example, if your CRM has a default setting to track user activity, you should manually disable this until you have a clear purpose and a lawful basis to enable it.



The Challenge: Oxfam, a global organization fighting poverty, runs numerous campaigns with varying goals, from event sign-ups to petition signatures. They needed a consistent way to ensure they were not over-collecting personal data for each campaign, adhering to the principle of data minimization.

The Strategy: Oxfam implemented a "data minimization by design" policy. For a petition, for example, the only required fields were a name and email. The form was designed to explicitly state that this data would only be used for the purpose of the petition. Any additional optional fields, like a phone number, were clearly marked and did not affect the ability to sign.

The Result: This simple but effective policy ensured compliance across their diverse campaigns. By only collecting what was necessary, Oxfam reduced its risk of data breaches and built a reputation for respecting user privacy.

Accountability and Record-Keeping

Under GDPR, the principle of Accountability requires organizations to be able to demonstrate their compliance. This means you must keep a record of all your data processing activities.

- **Record of Processing Activities (RoPA):** This is a mandatory record for most organizations that outlines what personal data you process, why you process it, where it is stored, and how long you keep it.
- **Data Protection Impact Assessments (DPIAs):** You must conduct a DPIA for any new project or campaign that is likely to result in a high risk to individual privacy. A DPIA helps you assess and mitigate these risks before you begin.

- **Consent Records:** You must maintain a clear, timestamped record of every individual's consent, including what they consented to and when. This is essential proof in case of a complaint or audit.

Conclusion

GDPR compliance is a non-negotiable part of digital marketing. By understanding the lawful bases for processing data, implementing consent management, and building a culture of data protection by design and accountability, you not only avoid legal and financial risks but also strengthen the trust that is foundational to your social mission. These principles ensure that your marketing efforts are not only effective but also ethical and transparent, leading to a more engaged and loyal community

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Under GDPR, which of the following is considered a valid lawful basis for processing personal data for a digital marketing activity?

- A. Financial benefit
- B. Social media following
- C. Legitimate interest**
- D. Audience size

Question 2

What does the GDPR principle of "Data Protection by Design" require an SEO to do?

- A. Only collect data on users who live in the EU.
- B. Implement data privacy and security measures at the start of any new project or system.**
- C. Hire a dedicated Data Protection Officer for all marketing campaigns.
- D. Design marketing campaigns to be entirely anonymous.

Question 3

According to the lesson, which of the following is a non-compliant way to obtain consent for cookies?

- A. A banner that allows users to select which types of cookies to accept.
- B. A pop-up that forces a user to click "Accept" to continue browsing.**
- C. A form with an un-checked box that the user must click to opt-in.
- D. A form that clearly explains what cookies are being used for.

Additional reading material

Please note that these materials are not mandatory and not included in the expected module's effort.

1. What is GDPR? <https://gdpr.eu/what-is-gdpr/> Accessed September 12, 2025

Lesson 12

Ethical use of data and information

Expected reading time: 12 minutes

Main page content

The objective of this lesson is to help you understand the importance of using data and information ethically in digital marketing. For social economy organizations (SEOs), ensuring that data practices align with ethical values is crucial to maintaining trust, avoiding potential harms, and contributing positively to society. This is because legal compliance (doing what the law requires) is not always the same as ethical practice (doing what is right). You will learn about the key ethical principles in data use, potential challenges, and how to apply these principles to your marketing activities. By the end of this lesson, you will be able to define ethical data usage, understand its implications, and apply best practices to create responsible and impactful marketing campaigns.

Before delving into the lecture, we recommend watching this youtube video on the ethics of sharing data, to have an overview on the value of personal data: <https://www.youtube.com/watch?v=GSEjXSxyD24>

The Foundational Principles of Ethical Data Use

Ethical data use involves collecting, processing, and sharing personal data in a way that respects the rights and dignity of individuals. For SEOs, this means ensuring that data practices align not only with legal standards but also with a deeper set of social and moral responsibilities. This is rooted in several core ethical principles:

- **Beneficence:** The duty to do good. In data terms, this means using data in a way that provides a clear and positive benefit to individuals or society, such as using data to improve a social program or provide a more personalized support service.
- **Non-maleficence:** The duty to do no harm. This is a critical principle that requires you to actively consider and avoid potential negative consequences of your data use, such as reinforcing social biases or creating manipulative marketing campaigns.

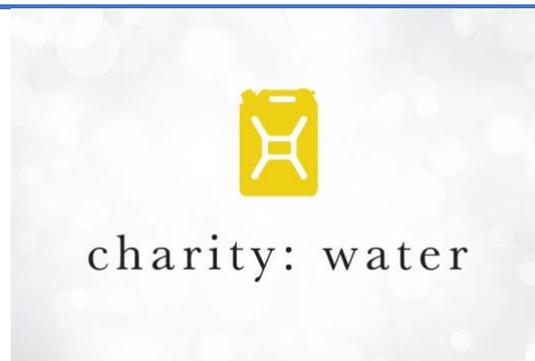
- **Autonomy:** Respecting an individual's right to self-determination. This is the ethical basis for concepts like consent and the right to control one's own data.
- **Justice:** Ensuring that data practices are fair and equitable. This means avoiding data practices that could disproportionately harm or exclude marginalized communities.

An ethical approach to data use is about creating a culture of respect for your audience. It recognizes that trust, for an SEO, is a far more valuable asset than any marketing metric.

Transparency and Informed Consent

Transparency is a key principle of ethical data use. It involves clearly communicating to your audience what data you are collecting, why you are collecting it, and how it will be used. This goes beyond a simple legal privacy policy and involves using clear, accessible language that anyone can understand. This transparency is the basis for **informed consent**. For consent to be truly informed, individuals need to understand what they are consenting to and must have a clear ability to opt out if they choose. Consent should be:

- **Freely Given:** Consent must be a genuine choice. You cannot make a user's access to a service conditional on them giving consent for something unrelated. For example, a user should not be forced to sign up for a newsletter to access a free report.
- **Specific and Granular Consent:** Individuals must consent to specific data uses, not a blanket agreement. You should provide separate opt-in checkboxes for different purposes, such as "email newsletter," "event updates," and "third-party sharing."
- **Informed:** *You* must provide clear and concise information about your data practices. This includes stating who you are, what data is collected, the purpose of the collection, and with whom the data might be shared. A simple, jargon-free summary of your privacy policy can be very effective here.
- **Active and Unambiguous:** Consent requires an active, opt-in action from the user, such as checking a box. Pre-checked boxes or silent assumptions are not ethically or legally compliant. The user's action must leave no doubt about their intent to consent.



Charity: Water's Transparent Data Use

The Challenge: Charity: Water, a non-profit dedicated to providing clean drinking water, relies heavily on donor data to run their campaigns. They faced the ethical challenge of building trust with a young, digitally-savvy donor base that is sensitive to privacy concerns.

The Strategy: Charity: Water adopted a radical transparency model. Instead of just a standard privacy policy, their website includes a concise, easy-to-read "Our Privacy Promise" that uses plain language to explain exactly what data is collected (e.g., name, email, donation history), why it's collected (e.g., to send updates and donation receipts), and that it is never sold or traded. They also provide live, real-time tracking of every donation, showing a donor precisely where their money is going, from the initial transfer to the final construction of a well, reinforcing their commitment to transparency and accountability.

The Result: By treating their data practices as an extension of their mission, Charity: Water built an exceptionally high level of trust with their audience. This transparency became a core part of their brand identity, leading to strong donor loyalty and word-of-mouth support.

Avoiding Bias and Minimizing Data Collection

Ethical data use requires a commitment to data minimization and the active avoidance of bias. The principle of non-maleficence is crucial here as your data practices should not cause harm or reinforce existing social inequalities. The core of the principle lies in:

- **Data Minimization:** Collect only the data that is absolutely necessary for your specific purpose. The less data you collect, the lower the risk of misuse or a data

breach. For a simple newsletter sign-up, for example, you likely only need an email address, not a phone number or home address.

- **Data Retention:** Ethically, you should not keep personal data for longer than is necessary. Establish clear data retention policies and securely delete data that is no longer needed. This reduces the risk of old data being compromised.
- **De-identification:** When personal data is no longer needed, consider anonymizing or pseudonymizing it for research or analytical purposes. This allows you to retain valuable insights without compromising individual privacy.
- **Recognizing Algorithmic Bias:** Algorithms used in digital marketing (e.g., for ad targeting, content personalization) can reflect and amplify biases present in the training data. This can lead to unfair or discriminatory outcomes, such as excluding certain demographics from seeing a volunteer recruitment ad.
- **Types of Bias:** Be aware of different types of bias, such as historical bias (when historical data reflects outdated stereotypes) and selection bias (when data is collected from a non-representative sample).
- **Mitigating Bias:** To combat bias, regularly audit your data and algorithms for discriminatory outcomes. Ensure that the data used for training AI models is diverse and representative. Use tools that help detect and correct for bias in your marketing technology.



The Trevor Project and Ethical AI Use

The Challenge: The Trevor Project, a non-profit focused on suicide prevention for LGBTQ youth, uses a data-driven risk assessment tool to triage incoming chats and calls from

people in crisis. The ethical stakes are incredibly high, as an inaccurate assessment could have tragic consequences.

The Strategy: They developed a custom AI model called "Crisis Contact Simulator" that trains on tens of thousands of conversations to flag high-risk situations. However, to combat bias, they partnered with experts to ensure the model was not learning from or reinforcing harmful stereotypes related to gender, race, or sexuality. They have a strict human oversight protocol, where the AI's suggestions are always reviewed by a trained counselor. The data is also anonymized to the highest degree to protect user privacy.

The Result: By prioritizing beneficence and non-maleficence, The Trevor Project created a system that leverages data for good while protecting vulnerable individuals from harm. The ethical safeguards built into the system are as critical as the technology itself.

Respecting Data Subject Rights and Ensuring Security

Ethically, SEOs must make an individual's data rights easily accessible and frictionless. This goes beyond legal compliance: it's about a deep-seated respect for the autonomy of your audience. If a user wishes to delete their personal information from a database, the process should be simple, transparent, and free of obstacles. This is also where your ethical responsibility for data security comes into play.

- **Frictionless Rights:** An ethical organization makes it easy for a person to access, correct, or delete their data. A simple, one-click unsubscribe link on an email is a great example of this. For more complex requests, like full data deletion, the process should be clearly laid out and easy to follow on your website. The goal is to make it as easy to leave as it was to join.
- **Prompt Response:** You have an ethical duty to respond to data subject requests in a timely manner. Delays or requests for unnecessary information can create friction and erode trust. Establish clear internal protocols to handle these requests efficiently.
- **Verifying Identity Securely:** While you must provide access to data, you also have an ethical responsibility to ensure you are only giving data to the correct individual. Implement a secure but simple process to verify a person's identity before fulfilling a request for access or deletion, such as through a verified email address or a secure login portal.

- **Data Security as an Ethical Imperative:** Ensuring the security of collected data is a fundamental ethical responsibility. A data breach can expose individuals to significant harm, from identity theft to emotional distress. This is especially critical for SEOs that handle sensitive information related to health, poverty, or political beliefs.
- **Technical Safeguards:** Protect data from unauthorized access through technical measures like encryption, where data is scrambled and unreadable without a key. Restrict access to sensitive information to only those on your team who have a "need-to-know" basis. Use strong passwords and multi-factor authentication on all tools that store personal data.
- **Data Vulnerability and Harm:** Ethically, you must consider the potential for harm if your data is compromised. For example, a non-profit working with survivors of abuse has an absolute ethical obligation to ensure the highest level of data security, as a breach could put individuals at physical risk. This means choosing tools and practices that reflect the sensitivity of the data you handle.



ELECTRONIC FRONTIER FOUNDATION

The Electronic Frontier Foundation (EFF) and Transparent Deletion

The Challenge: As a privacy-focused advocacy group, the Electronic Frontier Foundation (EFF) is held to an extremely high ethical standard regarding its own data handling. They needed to demonstrate their principles through their data practices, especially concerning the Right to Erasure.

The Strategy: The EFF created a clear, simple, and transparent process for data deletion. Their privacy policy explicitly states the right to request deletion and provides an easy-to-find email address for making such a request. They also outline the specific types of data they keep and for how long. The organization's internal policy ensures that data

deletion requests are handled promptly, permanently, and without requiring the individual to provide a reason.

The Result: By making their data deletion process simple and transparent, the EFF reinforced its core mission. This ethical approach to respecting individual rights builds credibility and positions the organization as a leader in data ethics.

Conclusion

For SEOs, the ethical use of data is a non-negotiable part of digital marketing. By understanding and actively implementing the core ethical principles of beneficence, non-maleficence, autonomy, and justice, you can build a deeper, more empathetic relationship with your community. This goes beyond legal compliance, ensuring your practices are not just effective but also ethical, transparent, and respectful. Ultimately, responsible data handling strengthens the trust that is foundational to your social mission, leading to a more engaged and loyal community.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

According to the lesson, which of the following is an example of the ethical principle of non-maleficence in data use?

- A. Collecting only the data necessary for a campaign.
- B. Using an email list that has clear consent.
- C. Ensuring an AI tool for recruitment does not reinforce social biases.**
- D. Providing a clear privacy policy on your website.

Question 2

The ethical principle of autonomy is most closely related to which of the following practices?

- A. Providing a clear and accessible privacy policy.
- B. Using data only for the purpose for which it was collected.
- C. Allowing users to easily correct or delete their personal data.**
- D. Storing data in a secure, encrypted database.

Collaborating in digital environments

The module includes the following lessons:

- 13. Agile project management approaches and tools*
- 14. Manage communication digitally*
- 15. Create an inclusive and accessible digital environment*
- 16. Promote digital well-being in the workplace*
- 17. Empower your team with visual collaboration tools*
- 18. Manage a transition to cloud working*
- 19. Mailing list and calendar integration*

Lesson 13

Agile project management approaches and tools

Expected reading time: 20 minutes

Main page content

The objective of this lesson is to introduce you to agile project management, a flexible and collaborative approach that can significantly enhance the efficiency and impact of digital projects for social economy organizations. This lesson will move beyond traditional project management to show you how agile's iterative and responsive nature can help your team navigate challenges and deliver greater value to your beneficiaries. By the end of this lesson, you will be able to define key agile concepts, understand core methodologies, and identify practical tools to implement agile approaches in your team.

Before diving into the world of project management, we recommend watching this youtube video for a brief overview: https://www.youtube.com/watch?v=zi7uGg6FVM4&ab_channel=TheDigitalProjectManager

Basics of Project Management

Before diving into agile, it's helpful to understand the fundamentals of project management. A project is a temporary endeavor with a defined beginning and end, undertaken to create a unique product, service, or result. A project plan outlines the scope, timeline, resources, and deliverables. For many years, the dominant approach was the Waterfall methodology, a linear, sequential model where each phase of a project must be completed before the next one begins. This approach works well for simple, predictable projects, but it can be rigid and slow to adapt to change.

In a digital context, where goals, technologies, and audience needs can change rapidly, the Waterfall method often proves too inflexible. For example, in a Waterfall approach, an entire website would be designed, built, and tested before any part of it is shown to the public. If user feedback collected after the launch reveals a critical flaw, a major and costly overhaul would be required. This is where agile project management provides a more responsive alternative, embracing change and continuous feedback.

The Agile Mindset and Core Methodologies

At its core, Agile is not just a methodology; it's a mindset defined by four key values from the Agile Manifesto.

For SEOs, the AGILE values translate into a more human-centered and flexible way of working:

- **Individuals and interactions over processes and tools:** While processes and tools are helpful, people and their ability to collaborate are the most important factors for project success.
- **Working solutions over comprehensive documentation:** The most important measure of progress is a completed project that delivers real value.
- **Stakeholder collaboration over contract negotiation:** The best results come from continuous collaboration with stakeholders, from donors to beneficiaries.
- **Responding to change over following a plan:** An agile approach embraces change, allowing teams to adjust strategies based on new data or unexpected events.

This mindset is put into practice through a number of specific frameworks:

- **Scrum:** a structured framework that is ideal for managing complex projects with a clear deadline. It uses short, time-boxed work cycles called sprints, typically lasting two to four weeks. Each sprint has a clearly defined goal. Key components of Scrum include specific roles (Product Owner, Scrum Master, and Development Team) and structured meetings (Sprint Planning, Daily Scrum, Sprint Review, and Sprint Retrospective).
- **Kanban:** a simpler, more visual methodology focused on continuous workflow. It is excellent for managing ongoing tasks or a content pipeline. Its core principles are to visualize your workflow (using a board with columns like "To Do," "In Progress," and "Done"), limit work in progress (WIP) to prevent bottlenecks, and manage flow to ensure tasks move smoothly.
- **Lean:** focuses on maximizing value and minimizing waste. For an SEO, this means eliminating anything that doesn't add value to your mission, such as unnecessary meetings, unused features, or redundant tasks. The goal is to deliver more value with less effort.

- **Extreme Programming (XP):** a more technical framework often used in software development, but its principles can be applied to digital projects. It emphasizes continuous delivery, small releases, and feedback. Key practices include short development cycles and a strong focus on testing and continuous integration.

Essential Agile Tools

Digital tools are essential for implementing agile methodologies, especially for remote or hybrid teams. These tools provide a shared workspace where teams can visualize their work, collaborate, and track progress in real-time.

- **Trello:** Trello is an incredibly simple and visual tool based on the Kanban methodology. It uses a system of boards, lists, and cards. Teams can create a board for a project, use lists to represent workflow stages (e.g., "To-Do," "Writing," "Editing," "Published"), and use cards for individual tasks. It's an excellent choice for SEO teams because it's intuitive and free for basic use.
- **Asana:** Asana is a more robust project management tool that supports both Kanban and more traditional list-based views. It's great for managing multiple projects at once and offers features like task dependencies and timelines. Asana is well-suited for organizations that need to track a variety of projects, from marketing campaigns to internal operations.
- **Jira:** While traditionally used by software developers, Jira is a powerful tool for complex projects. It offers advanced features for tracking tasks, reporting, and team collaboration, and it is a good option for SEOs with large or complex digital development projects.
- **Monday.com:** This platform is highly customizable and versatile, allowing teams to build dashboards that fit their specific needs, from managing marketing campaigns to tracking donor relationships.
- **ClickUp:** an all-in-one productivity platform that can be customized for any type of project, supporting a wide range of methodologies from Kanban to Scrum. It allows teams to manage tasks, documents, goals, and communication in a single place.

Real-World Case Studies: AGILE for SEOs



World Vision and Digital Fundraising

The Challenge: World Vision, a global humanitarian organization, needed to create a new digital fundraising platform quickly to respond to a natural disaster. The traditional waterfall approach would have taken months, and they didn't have that kind of time.

The Strategy: The team adopted an agile approach, breaking the project into two-week sprints. The first sprint focused on creating a basic donation form and a simple landing page. They launched this initial version immediately and gathered feedback. Subsequent sprints focused on adding new features like a fundraising thermometer, a social sharing function, and donor stories, based on what the data showed was most effective.

The Result: By launching a minimum viable product (MVP) and iterating quickly, World Vision was able to begin accepting donations within a month, far ahead of schedule. The agile approach allowed them to respond to a critical situation and adapt to the platform in real-time, raising more funds and providing help faster.



KIVA and microfinance solutions

The Challenge: Kiva, a non-profit that allows people to lend money to low-income entrepreneurs, needed to improve its loan application process to be more user-friendly for a global audience with varying levels of digital literacy. A single, large-scale redesign was too risky.

The Strategy: Kiva's product team used a series of agile sprints to tackle the challenge. In each sprint, they focused on a small part of the application form, such as improving the

photo upload function or clarifying a single instruction. They released these small changes frequently and gathered data and feedback from a subset of users.

The Result: This iterative, agile approach allowed Kiva to make continuous improvements without a risky, full-scale overhaul. By releasing and testing small changes, they were able to optimize the loan application process efficiently, leading to a significant increase in successful loan applications and greater accessibility for their global community.

Conclusion

Agile project management is not a buzzword reserved for the tech industry. For SEOs, it offers a powerful framework for navigating the complexities of digital work with flexibility and impact. By embracing the agile mindset and using tools like Scrum or Kanban, your team can become more responsive to change, more collaborative, and more focused on delivering real value. This ultimately allows you to achieve your mission more efficiently and effectively in a constantly changing digital landscape.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

According to the lesson, what is the key value of the agile mindset?

- A. Following a plan without changes.
- B. Prioritizing processes over collaboration.
- C. Responding to change over following a plan.
- D. Extensive documentation before any work begins.

Question 2

In Scrum, what is a "sprint"?

- A. A long-term project goal.
- B. A short, time-boxed period to complete a set amount of work.
- C. A type of software used for project management.
- D. A daily meeting to discuss progress.

Question 3

The core idea of the Kanban methodology is to:

- A. Conduct a daily stand-up meeting.
- B. Visualize the workflow and limit work in progress.
- C. Complete a project in a linear, step-by-step fashion.
- D. Assign a Product Owner, a Scrum Master, and a Development Team.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. 25 best PM tools <https://clickup.com/blog/best-project-management-tools/#10-top-features-to-look-for-in-a-project-management-tool->» Accessed September 15, 2025
2. An AGILE overview: <https://www.pmi.org/learning/library/agile-project-management-mandate-changing-requirements-7043> Accessed September 15, 2025

Lesson 14

Manage communication digitally

Expected reading time: 12 minutes

Main page content

The objective of this lesson is to provide you with a comprehensive overview of the digital communication tools available to social economy organizations. Effective communication is the lifeblood of any SEO, enabling you to build community, engage supporters, and amplify your mission. While platforms like social media and email are foundational, modern communication requires a holistic approach that includes dedicated tools for managing relationships and coordinating with stakeholders. This lesson will explore a range of digital tools, from widely used social media platforms to specialized Customer Relationship Management (CRM) systems.

Before delving into the lecture, we recommend watching this brief YouTube video to have a brief overview of digital communication tools: https://www.youtube.com/watch?v=9qUQdvNjRZ8&ab_channel=KarelVanIsacker

By the end of this lesson, you will be able to identify the right communication tools for your organization's needs, understand their strategic applications, and integrate them into a cohesive digital strategy.

Social and Content Platforms

Social media and content platforms are the primary channels for broadcasting your message, building brand awareness, and fostering a community around your cause. They are essential for sharing stories, providing updates, and mobilizing support.

- **Social Media Platforms:** Platforms like Facebook, Instagram, Tiktok, Threads, Twitter (X), and LinkedIn serve as the public face of your organization. Each platform has a different audience and purpose: Facebook is great for community engagement and events, Instagram is visual storytelling, Twitter is for real-time updates, and LinkedIn is for professional networking and B2B partnerships.
- **Video Platforms:** YouTube and TikTok are powerful tools for communicating your impact through video. YouTube is ideal for long-form content like documentaries

and interviews, while TikTok's short-form videos are perfect for engaging a younger audience with authentic, bite-sized content.

- **Blogs and Newsletters:** A blog on your website allows for in-depth storytelling and thought leadership. Newsletters, managed through tools like Mailchimp or Constant Contact, are essential for direct, private communication with supporters who have actively opted in to receive your messages. These channels are crucial for nurturing relationships and converting interest into action.

Customer Relationship Management (CRM) Systems

For an SEO, a CRM is a foundational tool for managing and nurturing relationships with every individual who interacts with your organization, from first-time donors to long-term volunteers. It is more than just a contact list; it is a centralized database that provides a 360-degree view of your community.

- **What is a CRM?** A CRM system allows you to store and manage contact information, track interactions, and analyze the journey of each person. You can see their donation history, the events they've attended, and the emails they've opened. This data enables you to personalize your communication, send relevant content, and build a deeper, more meaningful relationship.
- **Strategic Applications of a CRM:** A CRM allows an SEO to transition from a scattershot, mass communication approach to a highly strategic one. This is achieved through a number of key functions:
 - **Data Segmentation:** You can segment your audience based on their behaviors and interests. For instance, you could create a segment of supporters who have attended your events and another for those who have only donated online. This allows you to tailor messages to each group, increasing relevance and impact.
 - **Personalization:** Beyond just using a supporter's first name, a CRM allows you to personalize content based on their past actions. For example, you can send a targeted email thanking a supporter for their donation to a specific campaign, referencing their past contribution.
 - **Donor Journey Mapping:** A CRM helps you visualize and manage a donor's journey, from their first interaction (e.g., a newsletter sign-up) to becoming a recurring donor or a volunteer. This allows you to set up automated workflows that nurture the relationship at each stage.

- **Key CRM Tools:** There are a variety of CRM solutions available, with some offering specific features for non-profits.
 - Salesforce is a powerful, enterprise-level CRM that offers a non-profit success pack.
 - HubSpot provides a comprehensive free CRM that is an excellent starting point for smaller organizations.
 - Blackbaud is a CRM designed specifically for the non-profit sector.



The Challenge: "Hope for Education," a non-profit that provides scholarships, wanted to move beyond one-time donations to build long-term relationships with their supporters. They had a large database of contacts but no system for understanding their different levels of engagement.

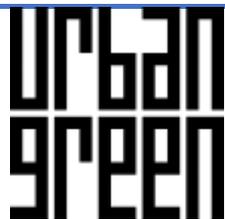
The Strategy: They implemented a CRM system to track every supporter's interaction. A person who signed up for their newsletter was tagged as a "prospect," and they received a series of emails with stories about student success. If a prospect made a donation, their status was updated to "donor," triggering a personalized email thanking them for their specific contribution and showing them how their money was being used.

The Result: By using the CRM to personalize communication based on the donor's journey, Hope for Education saw a 20% increase in the rate of donors making a second contribution. The CRM allowed them to nurture each relationship individually and efficiently, leading to a more loyal and engaged supporter base.

Stakeholder Management and Collaboration Tools

Beyond your external audience, effective communication requires tools for managing and collaborating with internal teams, partners, and key stakeholders. These tools are crucial for streamlining processes, fostering transparency, and ensuring everyone is aligned on the mission.

- Project Management Tools:** As discussed in a previous lesson, tools like Trello, Asana, or Jira are essential for coordinating tasks, tracking progress, and maintaining a transparent workflow among team members. They provide a single source of truth for all project-related communication, reducing the need for constant email chains. For an SEO, these tools can be used to manage everything from a content calendar to the launch of a new campaign, ensuring all team members are on the same page.
- Internal Communication Platforms:** Platforms such as Slack or Microsoft Teams have replaced internal email for many organizations. They allow for real-time messaging, file sharing, and the creation of dedicated channels for specific projects or teams, ensuring a single, organized hub for all internal communication. These tools are invaluable for fostering a transparent culture and allowing staff to easily share ideas and knowledge.
- Partnership and Volunteer Management:** For SEOs, tools dedicated to managing relationships with external partners and volunteers are invaluable. Some CRM systems have modules for this, while standalone platforms like VolunteerMatch or Galaxy Digital help streamline the recruitment, onboarding, and communication with your volunteer base, ensuring they remain engaged and informed. These tools facilitate digital communication with partners by providing a shared space to upload documents, track joint progress, and communicate securely.



The Challenge: "Urban Greens," a non-profit that creates urban community gardens, secured a partnership with a large tech company. The project involved coordinating dozens of corporate volunteers and sharing a complex project plan that included design documents, planting schedules, and progress photos. Managing this via email was becoming chaotic.

The Strategy: Urban Greens set up a dedicated project on Asana and invited key stakeholders from the corporate partner. All project-related communication, from task assignments to document sharing, was moved to this platform. The project manager created a shared timeline that both teams could see, and volunteers were assigned tasks

with clear deadlines. They also used the platform's messaging feature to provide real-time updates and answer questions.

The Result: This digital-first approach to stakeholder management eliminated email clutter and ensured everyone was aligned on a single, transparent project plan. The project was completed ahead of schedule, and the corporate partner praised the efficiency of the collaboration. The clear communication fostered by the tool led to a stronger partnership and a more successful project.

Conclusion

Effective digital communication for SEOs is a layered effort that requires a strategic blend of tools. Social and content platforms are vital for public outreach and community building. CRM systems are indispensable for nurturing individual relationships and personalizing your message. Finally, internal communication and stakeholder management tools ensure your team can operate efficiently and transparently. By choosing and integrating these tools thoughtfully, your organization can create a powerful and cohesive communication ecosystem that amplifies your mission and drives social impact.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which type of tool is best for an SEO to gain a 360-degree view of a supporter's donation history, event attendance, and email engagement?

- A. A social media platform
- B. A Customer Relationship Management (CRM) system**
- C. A project management tool
- D. An internal communication platform

Question 2

A SEO wants to manage a volunteer recruitment campaign and needs a tool to coordinate with staff and track individual volunteer tasks. Which of the following would be the most suitable tool for this purpose?

- A. Mailchimp
- B. Slack
- C. Trello**
- D. YouTube

Question 3

Which of the following is an example of using a CRM for **targeted, personalized messaging**?

- A. Sending a generic "thank you for your support" email to all supporters.
- B. Posting a general fundraising update on Facebook.
- C. Sending a campaign update specifically to individuals who have previously donated to a similar cause.**
- D. Using a blog post to share a beneficiary's story with the general public.

Additional reading material

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Tools to communicate virtually: <https://www.airmeet.com/hub/blog/digital-tools-that-are-used-for-communicating-virtually/> Accessed September 15, 2025

Lesson 15

Create an inclusive and accessible digital environment

Expected reading time: 15 minutes

Main page content

The objective of this lesson is to help you understand the importance of creating an inclusive and accessible digital environment within your social economy organization (SEO). While many SEOs focus on external accessibility for their websites and public-facing content, ensuring that your internal digital tools and platforms are also accessible is crucial. This not only aligns with your mission to serve all people but also improves team efficiency, productivity, and morale. A truly inclusive digital environment empowers every team member, regardless of their abilities, to contribute fully to your mission.

By the end of this lesson, you will be able to identify common accessibility challenges, understand why an inclusive approach is beneficial for your team, and apply practical tips to make your internal digital tools more accessible.

To approach the subject, we recommend watching this youtube video on the basics of digital accessibility:

https://www.youtube.com/watch?v=grrx2Lva7T0&ab_channel=DequeSystems

The Meaning and Importance of Digital Accessibility

Digital accessibility is the practice of designing and developing digital content, tools, and platforms so that they are usable by all people, including those with disabilities. A key framework for this is the Web Content Accessibility Guidelines (WCAG), which outlines principles to ensure content is Perceivable, Operable, Understandable, and Robust. This means that a person with a disability should have the opportunity to acquire the same information, engage in the same interactions, and enjoy the same services as a person without a disability, in an equally effective and integrated manner.

For a social economy organization, prioritizing internal digital accessibility is an ethical imperative that aligns directly with your mission to serve all people. It's not just about legal

compliance; it's about living your values from the inside out. Here's a deeper look into why it's so vital:

- **Ethical and Mission Alignment:** As an SEO, your core purpose is to create a more equitable world. By making your internal tools accessible, you are not only serving your external community but also ensuring that your own workplace reflects the same values of equity and inclusion. It's a powerful statement of commitment to your mission.
- **Wider Talent Pool:** According to the World Health Organization, over a billion people worldwide live with some form of disability. By building an accessible digital environment, you remove barriers that might prevent talented individuals from joining and thriving on your team. This opens up your recruitment to a larger, more diverse pool of candidates.
- **Enhanced Usability for All:** Accessible design is simply good design. Features initially intended to assist people with disabilities often improve the user experience for everyone. For example, high-contrast color schemes help people with low vision but also make content easier to read in a sunny office or on a mobile device. Providing captions for videos helps team members who are hearing impaired but also benefits those who need to watch a training video in a noisy environment or without sound.
- **Improved Team Productivity and Morale:** When all team members can use the same tools, communication is more efficient and collaboration becomes seamless. An accessible environment eliminates the need for workarounds or special accommodations, reducing friction and ensuring that every person can contribute fully to their work. This fosters a sense of belonging and empowerment that boosts overall morale.
- **Risk Mitigation and Future-Proofing:** Many countries have laws, like the Americans with Disabilities Act (ADA) in the U.S. or the European Accessibility Act, that require digital platforms to meet certain accessibility standards. While these often focus on public-facing sites, the legal landscape is evolving. By being proactive and implementing accessibility best practices now, you are future-proofing your organization against potential legal challenges and showing that you are a forward-thinking and responsible leader in your sector.

Practical Tips for Inclusive Digital Tools

Making your internal digital environment accessible doesn't require a complete overhaul; it begins with an awareness of common issues and a commitment to simple, practical changes. Here are some actionable tips for your team:

- **Provide Text Alternatives for Images:** For team members who use screen readers, images without text descriptions are invisible. When sharing charts, graphs, or infographics in a presentation or on an internal platform like Slack or Teams, always include a concise alt-text description that explains the content of the image.
- **Use Clear and Legible Fonts and Colors:** Ensure your internal documents, presentations, and dashboards use fonts that are easy to read. Avoid light-colored text on light backgrounds and ensure sufficient color contrast. Tools like the WebAIM Contrast Checker can help you check color combinations.
- **Structure Content Logically:** Use proper headings (H1, H2, H3) in documents and emails to create a clear hierarchy. This allows screen readers to navigate the content efficiently and helps all users quickly scan and understand the structure of the information. Avoid using bold or a larger font size to create a heading, as this does not provide the same structural information.
- **Caption and Transcribe Video and Audio Content:** For internal meetings or training videos, provide captions or a full transcript. This is essential for team members with hearing impairments, but it also benefits everyone who needs to watch a video in a noisy environment or wants to quickly scan the content.

Choosing and Implementing Accessible Tools

The tools you choose play a significant role in your ability to create an inclusive environment. When evaluating new software, always prioritize those that are built with accessibility in mind.

- **Accessibility Statements:** Look for an Accessibility Conformance Report (ACR) or a voluntary product accessibility template (VPAT) from the vendor. This document details the tool's compliance with accessibility standards like WCAG.
- **User Testing:** Whenever possible, involve team members with disabilities in the testing and evaluation of new tools. Their feedback is invaluable for identifying real-world accessibility issues that automated checks may miss.
- **Centralized Accessibility Guidelines:** Create a clear, internal policy or guide that provides team members with best practices for creating accessible documents,

presentations, and communication. This ensures consistency across the organization.

Best Practices from Real-World Case Studies

Let's deep dive on some case studies to fully understand how an inclusive and accessible digital environment is being created in real organizations:



**British
RedCross**

The Challenge: The British Red Cross is a large organization with a diverse workforce, including many employees who work in the field and rely on mobile devices. They needed a communication platform that was fully accessible to everyone, including those with visual impairments who use screen readers.

The Strategy: Before fully deploying Microsoft Teams, they conducted extensive accessibility testing. They discovered that while the platform was largely accessible, the custom apps they were developing to integrate with it needed to be built with keyboard navigation and screen reader compatibility from the ground up. They worked with developers to ensure that every feature, from chat functions to file sharing, met WCAG standards.

The Result: By prioritizing accessibility in their implementation, the British Red Cross ensured that all staff could communicate effectively, regardless of their location or disability. This created a more inclusive work environment and improved internal communication across the entire organization.



The Challenge: As an organization dedicated to serving people with visual impairments, the CNIB has an absolute ethical imperative to ensure its internal tools are fully accessible. They needed to manage a large amount of internal data, including donor lists and client information, in a way that was usable for their entire team.

The Strategy: The CNIB adopted a comprehensive strategy that involved using cloud-based tools that were known for their accessibility features. For their internal documents, they enforced a policy of using standardized templates that included proper heading structures, table of contents, and alt-text fields for all images. They also provided training to all staff on how to use accessible features and create accessible content.

The Result: This proactive approach ensured that their internal digital environment was fully navigable by their employees who use screen readers and other assistive technologies. It not only fulfilled their ethical commitment but also streamlined their internal processes and empowered their diverse team.

Conclusion

Creating an inclusive and accessible digital environment is a core ethical and practical responsibility for any SEO. By making simple, consistent changes to your internal tools and platforms, you can break down barriers and empower every team member to contribute to their full potential. This commitment not only aligns with your mission to serve all people but also strengthens your organization's efficiency, fosters a more diverse and innovative team, and builds a culture of respect and inclusion from the inside out.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary benefit of making internal digital tools accessible for SEO?

- A. It reduces the need for external website audits.
- B. It improves team productivity and allows for a more diverse workforce.**
- C. It eliminates the need for any in-person meetings.
- D. It guarantees the organization will never face a lawsuit.

Question 2

According to the lesson, which of the following is a practical way to make a document more accessible to screen reader users?

- A. Using a large, bold font for all text.
- B. Using a color scheme with low contrast.
- C. Creating a clear hierarchy with proper headings (e.g., H1, H2, H3).**
- D. Adding all images without any alt-text.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Best practices for digital accessibility: <https://changingpaces.com/creating-inclusive-online-communities-best-practices-for-digital-accessibility/%22> Accessed September 15, 2025
2. Digital accessibility after the EU accessibility act: <https://unipd-centrodirittiumani.it/en/topics/the-european-accessibility-act-what-changes-for-digital-accessibility> Accessed September 15, 2025
3. LinkedIn, Sara Simmonds. «You're leading tech-driven innovation. How can you foster inclusivity and diversity in your initiatives?», <https://www.linkedin.com/advice/1/youre-leading-tech-driven-innovation-how-can-licsc>.»<https://www.coursera.org/articles/history-of-ai> Accessed December 16, 2024.

Lesson 16

Promoting digital wellbeing in the workplace

Expected reading time: 14 minutes

Main page content

The objective of this lesson is to help you understand and implement strategies for promoting digital wellbeing for your social economy organization (SEO), both for your team and your audience. Digital wellbeing is about creating a healthy, balanced relationship with technology. For SEOs, this is crucial because our work often requires high engagement with digital tools, which can lead to burnout, stress, and a blurring of work-life boundaries. By fostering a culture of digital wellbeing, you not only protect the mental health of your team but also create more meaningful, ethical, and sustainable engagement with your community.

Before delving in to the lesson, we recommend watching this brief youtube video to better understand the basics of digital wellness: https://www.youtube.com/watch?v=qAgk7PE4Y_Y&ab_channel=2MinuteTeachables

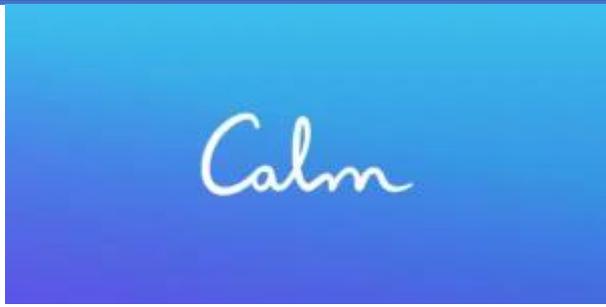
By the end of this lesson, you will be able to define digital wellbeing, identify its key challenges, and apply practical strategies to promote a healthier use of technology within your organization and in your communications.

Understanding the Core Concepts

Digital wellbeing is a holistic concept that encompasses physical, mental, and social health in relation to our use of digital technology. It's not about rejecting technology but about using it mindfully and intentionally to support our goals without compromising our overall health.

- **Mindful Technology Use:** This involves being aware of how and why you use digital tools. For an SEO team, this means questioning if a constant stream of notifications is truly necessary or if a particular app is genuinely helping you achieve your mission.

- **Preventing Burnout:** The 24/7 nature of digital work can lead to burnout, especially for passionate SEOs. Strategies for digital wellbeing focus on setting boundaries, disconnecting, and protecting time for rest and recovery.
- **Managing Data-Driven Stress:** The constant pressure to monitor analytics—like social media likes, website traffic, and donation conversion rates—can lead to anxiety and a sense of inadequacy. Digital wellbeing for an SEO involves recognizing this stress and focusing on the bigger, long-term impact rather than daily metrics.
- **Combating Digital Fatigue:** SEOs teams are often on the front lines of digital activism and fundraising, which can be emotionally and mentally taxing. Digital fatigue is the mental exhaustion that comes from constant exposure to news, online harassment, and the emotional weight of your cause.



Digital wellbeing in practice: The Calm App

The Calm app, a mindfulness and meditation app, provides a great example of an organization that promotes digital wellbeing both internally and externally.

- **Internal Practice:** Calm’s internal team is encouraged to use the app as part of their workday. They have designated meditation rooms and time blocked for personal mindfulness practice, demonstrating a top-down commitment to the very product they are selling.
- **External Communication:** Calm’s marketing is built on the principle of providing value, not just selling a product. Their newsletters offer free meditation tips and calming sounds without a hard sell. Their social media channels share guided meditations and wellness quotes, providing a peaceful break from the typical digital noise. This approach attracts and retains users by modeling the behavior they promote.

Strategies for team wellbeing in the digital age

Fostering digital wellbeing starts internally. Implementing a few key strategies can help your team create healthier habits and reduce the risk of burnout.

- **Set Clear Boundaries:** Encourage your team to set specific "unplug" times, especially outside of regular working hours. This can be supported by policies that discourage sending and responding to non-urgent emails and messages late at night or on weekends.
- **Encourage Digital-Free Time:** Promote a culture where breaks away from the screen are valued. This could be a "no-screen" lunch hour or encouraging walking meetings instead of virtual ones. The goal is to provide a break for the eyes and the mind.
- **Establish Communication Norms:** Use internal communication tools, like Slack or Microsoft Teams, mindfully. Create guidelines on when to use different channels (e.g., Slack for quick questions, email for detailed discussions) and use features like "do not disturb" to protect focused work time.
- **Implement "Focus" Sessions:** Encourage your SEO team to use time-blocking for specific tasks. For example, block out two hours for "content creation," during which all notifications are turned off, and a separate block for "analytics review." This prevents the constant context-switching that leads to mental fatigue.
- **Support Digital Skills Training:** Provide training on how to use digital tools more efficiently. This can reduce frustration and the time spent on unproductive tasks. Teach team members how to use filters, set up automation rules, and customize their dashboards to reduce visual clutter and noise.
- **Promote Mindful Content Consumption:** Encourage your team to be intentional about what they consume online. This includes setting aside specific times to check social media trends or news related to their work, rather than being constantly tethered to the news cycle.



The Human Rights Campaign (HRC) and Intentional Boundaries

The Human Rights Campaign (HRC) is an organization known for its fast-paced, responsive digital campaigns. To prevent burnout, their leadership implemented a policy called "Intentional Disconnection." Employees were encouraged to use their digital communication tools to set clear expectations for when they would be available. For example, they might set an auto-reply on Slack that reads, "I am off for the evening and will respond in the morning." The leadership also made it clear that after-hours messages were for emergencies only and that they did not expect instant replies. This policy was supported by a culture that celebrated taking time off and recharging.

Promoting Wellbeing in External Communications

An SEO's commitment to digital wellbeing should be reflected in how they communicate with their community. This builds trust and positions your organization as a responsible, ethical actor.

- **Respect Audience Attention:** Be mindful of the frequency and volume of your external communications. Avoid overwhelming your audience with an endless stream of emails or push notifications. For example, instead of daily emails, consider a weekly digest.
- **Focus on Value, Not Urgency:** Craft messages that provide genuine value rather than relying on manipulative urgency tactics (e.g., "Donate now or else!"). This approach respects your audience's autonomy and builds a more sustainable relationship.
- **Provide Control and Transparency:** Give your audience clear and easy ways to control their communication preferences. This includes providing prominent and functional unsubscribe links, as well as options to reduce the frequency of emails without fully opting out.

- **Use Push Notifications Mindfully:** While push notifications are a powerful tool, they are also highly intrusive. Ethically, they should be used sparingly and only for high-value content or critical updates, not for every new blog post or social media share.
- **Foster a Healthy Online Community:** Actively moderate your social media channels to remove harmful comments and prevent online harassment. A digital community that feels safe and supportive is a cornerstone of digital wellbeing.

Conclusion

Promoting digital wellbeing is a vital component of a modern SEO's strategy. By fostering a healthy relationship with technology for your team and extending this ethos to your external communications, you not only improve productivity and prevent burnout but also strengthen the ethical foundation of your mission. This commitment to intentional, mindful technology use demonstrates that your organization is a responsible leader, capable of creating both a positive social impact and a healthy, sustainable work environment.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following is a key component of promoting digital wellbeing for your team?

- A. Requiring team members to be available 24/7.
- B. Encouraging the use of a variety of new apps each week.
- C. Establishing clear boundaries for non-urgent communication outside of work hours.**
- D. Sending all internal messages through a single group chat.

Question 2

According to the lesson, how can an SEO's external communications promote digital wellbeing for their audience?

- A. By sending a high volume of daily emails to ensure supporters don't miss anything.
- B. By using urgent and emotionally-driven language to encourage immediate action.
- C. By providing value and giving supporters control over their communication preferences.**
- D. By creating a complex email opt-out process to retain subscribers.

Question 3

The Calm app case study illustrates the importance of:

- A. Using a single platform for all communications.
- B. Ignoring digital wellbeing in marketing to focus on product features.
- C. Promoting a healthy relationship with technology both internally and externally.**
- D. Requiring employees to use the product even outside of work.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. TechTarget, Amanda Stevens. «10 tips to promote digital wellness in the workplace, <https://www.techtarget.com/whatis/feature/10-tips-to-promote-digital-wellness-in-the-workplace>.» Accessed September 15, 2025
2. Lark, editor team. Digital Wellbeing: A Guide to Maintaining Balance in the Digital Age, https://www.larksuite.com/en_us/topics/productivity-glossary/digital-wellbeing Accessed September 15, 2025

Lesson 17

Empower your teams with visual collaboration tools

Expected reading time: 17 minutes

Main page content

The objective of this lesson is to introduce you to the power of visual collaboration tools and how they can transform the way your social economy organization (SEO) works. Visual collaboration is about moving beyond text-based communication to a shared digital space where ideas can be explored, organized, and refined in real-time. For SEOs, this is crucial for building consensus, fostering creativity, and making complex projects more accessible and transparent for all team members, regardless of their location or role. By using these tools, you can ensure that every voice is heard and that your team's collective brilliance is harnessed to its full potential.

By the end of this lesson, you will be able to define visual collaboration, understand its core benefits, and apply it through practical tools and real-world examples to enhance your team's effectiveness.

Before diving in, you can find here a youtube video on how to use Miro, one of the most used free digital board: https://www.youtube.com/watch?v=UnPy3Fw-7WM&ab_channel=DanielWirtz

The Core of Visual Collaboration

Visual collaboration is a dynamic process that uses visual aids, like digital whiteboards, sticky notes, diagrams, and images, to facilitate group work and problem-solving. This approach is designed to:

- **Make the Abstract Concrete:** It helps teams turn abstract ideas and complex data into tangible, easy-to-understand visuals. Instead of a long list of tasks, a project roadmap becomes a visual timeline.
- **Encourage Inclusive Participation:** In a traditional meeting, louder voices can dominate. On a digital whiteboard, every team member can contribute simultaneously, using digital sticky notes to add their ideas without interruption. This empowers introverted team members and ensures a richer diversity of thought.
- **Foster a Shared Understanding:** Visual tools create a "single source of truth." All team members can see the project's progress, the relationships between different ideas, and the overall strategy in one shared, accessible space, reducing miscommunication and silos.
- **Enhance Creativity and Brainstorming:** The free-form nature of a digital whiteboard encourages teams to be more creative. Without the rigid structure of a text document, teams can draw connections between disparate ideas, sketch out new campaign concepts, or build a user flow that would be difficult to describe in words.
- **Reduce Ambiguity and Miscommunication:** Complex projects often suffer from different interpretations of the same plan. A visual roadmap or flowchart ensures that everyone on the team has the same understanding of a process or a goal, from the beginning to the end. For an SEO, this could mean visually mapping out the donor journey to ensure all departments are aligned.

Practical Visual Collaboration Tools

A variety of digital tools are available to help your team get started with visual collaboration. While each has a unique focus, they all offer a digital canvas for shared work.

- **Miro:** a leading online collaborative whiteboard platform designed for remote and hybrid teams. It is a highly versatile tool that can be used for everything from brainstorming and project planning to workshops and presentations. Its key features include a massive library of templates, integrations with other tools like Slack and Asana, and a nearly infinite canvas that can grow with your ideas. Miro is especially useful for SEOs who need to visualize complex processes like campaign funnels or theory of change models.
- **Mural:** a digital workspace that focuses on visual collaboration and creative thinking. It offers a user-friendly interface with features designed for design thinking,

agile retrospectives, and strategic planning. It is known for its strong facilitation tools that help guide a team through a structured activity, making it a great option for SEO teams that want to run structured workshops and brainstorming sessions.

- Microsoft Whiteboard:** Integrated into the Microsoft 365 suite, Microsoft Whiteboard is a simple and effective tool for basic visual collaboration. It's ideal for teams already using Microsoft products for internal communication. It provides a shared canvas for drawing, adding sticky notes, and inserting images, making it a great option for quick team brainstorms or spontaneous meetings where a full-featured tool might be overkill.

Practical Examples from SEOs



Strategic Planning at Global Impact Alliance

The Challenge: The leadership team at "Global Impact Alliance," a non-profit dedicated to fighting climate change, needed to develop a new five-year strategy. The project was complex, with multiple stakeholders and a vast amount of data. Their previous text-based strategic plans were long, difficult to share, and often sat unread on a server.

The Strategy: The team used Miro to create a digital strategic planning board. They started with a brainstorming session where each team member added their ideas on digital sticky notes. From there, they organized the notes into clusters and used diagrams to map out their core goals, key initiatives, and the relationships between them. They created a visual roadmap that everyone could access, showing the entire five-year plan in a single view. The board was a living document that was updated as the strategy evolved.

The Result: The visual nature of the board allowed for a more inclusive and creative planning process. It also ensured that the final strategy was clear, transparent, and easy to communicate to the entire organization, leading to greater alignment and buy-in.



Remote Team Retrospective at Community Connect

The Challenge: "Community Connect," a small non-profit that provides resources for local communities, has a fully remote team. After a major campaign, the team wanted to conduct a retrospective to learn from their successes and failures, but they struggled to replicate the energy of an in-person workshop.

The Strategy: The team used a Miro board for their retrospective, which followed a "What went well, what could be improved" structure. Each team member spent 10 minutes silently adding digital sticky notes to the board, representing their thoughts. The facilitator then organized the notes and the team voted on the most important topics to discuss. The shared visual space allowed everyone to see all the feedback at once and prioritize discussions democratically.

The Result: The digital retrospective proved to be more effective and inclusive than previous text-based methods. It gave every team member a voice, allowed for a transparent review of the project, and helped the team collaboratively identify concrete actions for improvement in their next campaign.

Conclusion

Visual collaboration tools are not just a nice-to-have; they are a critical asset for modern SEOs. By embracing a visual approach, your team can move beyond the limitations of traditional communication and tap into a more creative, inclusive, and efficient way of working. These tools empower every team member to contribute their ideas, ensure a shared understanding of your mission, and ultimately help your organization solve complex social challenges more effectively.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is a key benefit of using a visual collaboration tool like Miro for a remote team?

- A. It forces team members to only communicate via text.
- B. It encourages everyone to talk at once during meetings.
- C. It allows team members to contribute ideas simultaneously and anonymously.
- D. It eliminates the need for any meetings.

Question 2

According to the lesson, a key purpose of visual collaboration is to:

- A. Replace all forms of verbal communication.
- B. Make abstract ideas tangible and easy to understand.
- C. Require team members to follow a rigid, linear process.
- D. Reduce the need for any project planning.

Question 3

The Youth Empower Now case study demonstrates how visual collaboration tools can be used to:

- A. Manage a team's daily stand-up meeting.
- B. Create a shared and transparent project roadmap.
- C. Replace a team's internal communication platform.
- D. Automate all project tasks.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Boxblog. »How to empower your team with visual collaboration tools, <https://blog.box.com/visual-collaboration-tools>.« Accessed September 15, 2025.
2. Expert Insights, Mirrel McDade. «The Top 10 Visual Collaboration Solutions, <https://expertinsights.com/insights/the-top-visual-collaboration-solutions/>.» Accessed September 15, 2025.
3. Mural, Bryan Kitch. «How to make a digital vision board: A complete guide, <https://www.mural.co/blog/digital-vision-board><https://www.gensler.com/blog/driving-inclusivity-in-digital-content>.» Accessed September 15, 2025.
4. Miro. «What is Miro? Get to know our visual workspace for innovation, <https://miro.com/what-is-miro/#get-to-know-miro>.»<https://www.coursera.org/articles/history-of-ai> Accessed September 15, 2025.
5. Empowerig your team with visual management tools <https://klaxoon.com/insight/5-ways-to-empower-your-team-with-visual-management-tools> Accessed September 15, 2025

Lesson 18

Manage a transition to cloud working

Expected reading time: 15 minutes

Main page content

Managing a Transition to Cloud Working

The objective of this lesson is to provide a clear roadmap for managing a transition to cloud working within your social economy organization (SEO). As more organizations embrace remote and flexible work models, moving your operations from on-premise servers and local computers to a cloud-based environment becomes not only a convenience but a strategic necessity. A well-managed transition can unlock powerful benefits, from enhanced collaboration and efficiency to improved data security and cost savings, all of which directly support your mission.

Before starting with the lesson, we recommend watching this YouTube video that briefly explain how cloud computing works in practice:
<https://www.youtube.com/watch?v=vqlQr7eufx8&t=14s+>

By the end of this lesson, you will understand the fundamentals of cloud working, have a practical step-by-step guide for a successful transition, and know how to foster a team culture that thrives in a digital-first environment.

Basics of Cloud Working

Cloud working is the practice of using computing services (such as servers, storage, databases, networking, software, and analytics) that are delivered over the internet. The "cloud" is a powerful, interconnected network of remote servers that are hosted on the internet, which store and manage data. Think of it as renting digital space and software from a large, secure data center instead of owning and maintaining your own physical infrastructure.

For most SEOs, the transition to the cloud focuses on Software as a Service (SaaS). This model provides you with ready-to-use software applications over the internet on a

subscription basis, eliminating the need to install and maintain them on individual devices. You simply log in via a web browser to access tools like email, document creation, and project management.

Benefits of a cloud-first approach include:

- **Cost-Effectiveness:** It significantly reduces the need for expensive hardware, maintenance, and IT staff, allowing your organization to reallocate resources to mission-critical activities.
- **Enhanced Collaboration:** Your team can access, edit, and share documents in real-time from anywhere in the world, breaking down silos and improving teamwork.
- **Flexibility and Scalability:** Cloud tools are designed to scale with your organization. Whether you're a small startup or a large, growing SEO, you can easily add or remove users and storage as your needs change.
- **Improved Security and Reliability:** Reputable cloud providers invest heavily in sophisticated security measures and offer robust data backup and disaster recovery, often exceeding what a small-to-medium SEO could manage on its own.

The Transition Plan: A Phased Approach

A successful transition is not just a technical change; it's a change management project. Follow these four phases for a smooth migration.

Phase 1: Assessment and Preparation

This is a critical information-gathering stage. Start by making a detailed inventory of all your existing digital assets, including software licenses, physical hardware, and all data locations.

Next, identify your team's specific pain points and needs by conducting a survey or interviews. Do they need better tools for file sharing? Is a lack of remote access a common frustration? This feedback will inform your tool selection and help you get team buy-in.

Phase 2: Tool Selection

This is where you choose the specific cloud tools you will use.

- **Prioritize a Central Suite:** Instead of adopting many different tools, consider a comprehensive suite like Google Workspace or Microsoft 365. These platforms offer

email, document creation, file storage, and communication tools all in one integrated system, which simplifies training and management.

- **Focus on Security and Compliance:** For an SEO, data security is non-negotiable, especially when handling sensitive donor or beneficiary information. Look for providers with strong security features, like multi-factor authentication (MFA) and data encryption. Ensure the provider complies with relevant data protection regulations (e.g., GDPR).
- **Evaluate Cost and Support:** Look for providers that offer non-profit discounts or special pricing. Also, assess their customer support. What kind of training and technical assistance do they offer?

COMMUNITY SOLUTIONS

Scaling a National Charity

The Challenge: "Community Solutions," a national charity with over 100 employees and dozens of regional offices, used a fragmented IT system. Each office had its own server, different communication tools, and inconsistent data storage. This created silos, made it difficult to share information, and was expensive to maintain.

The Solution: The leadership decided to fully embrace a cloud-first model. They chose a major provider's comprehensive suite, which included a unified platform for email, a shared file repository, and an internal communication tool. They launched the transition as a structured project with a clear timeline. They started with a pilot program in one region, gathering feedback and refining the training materials before rolling it out nationally.

The Result: The transition unified the organization's technology infrastructure, leading to significant cost savings on IT maintenance. More importantly, it broke down communication barriers between regions and empowered the team to work together seamlessly, leading to faster response times for campaigns and a more collaborative culture.

Phase 3: Implementation and Migration

This is the technical phase of the transition.

- **Conduct a Pilot Program:** Roll out the new tools to a small, tech-savvy group of users first. Their feedback on usability and workflow can help you identify and fix any issues before the broader launch.
- **Migrate Data Systematically:** Do not move all your data at once. Start with less-critical data and progress to more complex information. Use this as an opportunity to clean up old files and archive what is no longer needed. Many cloud providers offer tools to help automate this process.
- **Communicate Continuously:** Keep the entire team informed throughout the process. Be transparent about the timeline, what to expect, and the benefits of the transition.

Phase 4: Training and Support

A transition is not complete until your team is comfortable and proficient with the new tools.

- **Provide Comprehensive Training:** Offer hands-on training sessions for the new tools. Don't just show them *what* to do, explain *why* it's better. For example, show how real-time collaboration on a cloud document eliminates the need for endless email attachments.
- **Designate "Cloud Champions":** Identify a few tech-savvy team members who can serve as peer-to-peer support for their colleagues. This informal support network is often more effective than formal help desks.
- **Gather Feedback:** After the transition, regularly check in with your team to see how they're adapting. Be open to feedback and willing to make adjustments to your processes.



Empowering a Small Non-Profit

The Challenge: "Hope for All," a small non-profit with 10 staff members, relied on a single computer in the office to store all their critical files. When their Director of Communications started working from home, she couldn't access campaign materials, leading to delays and frustration.

The Solution: The team decided to transition to a cloud-based file storage and collaboration suite. They chose a provider that offered a significant non-profit discount and had strong security features. The transition was straightforward: they migrated their files over a weekend, and the Director of Communications received a brief training session on how to access and share documents from home.

The Result: The move to the cloud immediately improved efficiency. All team members, whether in the office or working remotely, could access and collaborate on documents in real-time. This newfound flexibility allowed the team to work more effectively and reduced the risk of data loss from a single hardware failure.

Security and Data Management

Security in the cloud is a shared responsibility between your organization and the cloud provider. By taking proactive steps, you can significantly reduce your risk.

- **Multi-Factor Authentication (MFA):** This is the single most important security measure you can implement. MFA requires users to provide two or more verification factors to gain access to a resource, dramatically reducing the risk of a compromised account.
- **Access Control:** Use role-based access to limit who can access sensitive data. Not everyone needs access to donor financial records or beneficiary personal information.

- **Regular Backups:** While cloud providers offer their own backups, it is best practice to have a separate, independent backup of your most critical data.
- **Employee Training:** The most common cause of data breaches is human error. Train your team to recognize phishing scams, use strong passwords, and understand their role in maintaining data security.

Conclusion

Managing a transition to cloud working is a significant undertaking, but it is one of the most impactful investments an SEO can make. By moving to a flexible, secure, and collaborative digital environment, you empower your team to work more efficiently, protect your data, and scale your operations to meet the growing demands of your mission. This strategic shift will not only modernize your technology but also strengthen your organization's resilience and ability to make a lasting difference.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary benefit of a cloud-based system over an on-premise server for an SEO?

- A. It is always a free service.
- B. It requires less IT knowledge from the team.
- C. It offers greater accessibility for remote work and reduces hardware costs.
- D. It is only accessible from a single location.

Question 2

According to the lesson, what is the most important security measure an SEO should implement when using cloud tools?

- A. Using a different password for every account.
- B. Using a public Wi-Fi network.
- C. Never sharing a file with a team member.
- D. Multi-factor authentication (MFA).

Question 3

The Community Solutions case study demonstrates how a cloud transition can help a large organization by:

- A. Replacing all of their employees with automation.
- B. Creating silos between different offices.
- C. Unifying their fragmented IT systems to improve collaboration.
- D. Eliminating the need for any internal communication.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Online Innovation, Kevin Danaher. «Working in the Cloud, https://www.codegent.com/blog/2011/10/working_in_the_cloud/. Accessed September 15, 2025.
2. builtin. «Cloud Computing, <https://builtin.com/cloud-computing>. Accessed September 15, 2025.
3. Microsoft “tech for non profit”. <https://www.microsoft.com/en-us/nonprofits> Accessed September 15, 2025

Lesson 19

Mailing lists and calendar integration

Expected reading time: 10 minutes

Main page content

The objective of this lesson is to show you how to leverage two fundamental digital tools—mailing lists and calendar integration—to improve internal communication, project management, and team efficiency for your social economy organization (SEO). These tools go far beyond simple email and scheduling; when used strategically, they can create a more transparent, organized, and collaborative work environment that directly supports your mission.

By the end of this lecture, you will be able to understand the core benefits of mailing lists and calendar integration, apply best practices to your organization's workflow, and see how these tools can be used to manage complex projects and campaigns effectively.

The Power of Mailing Lists

A mailing list (also known as a Google Group or a Microsoft 365 Group) is a single email address that automatically forwards messages to a defined group of people. Instead of manually adding a long list of email addresses, you can simply send an email to a single, memorable address (e.g., fundraising@myorg.org) and know it will reach everyone on that team.

For an SEO, mailing lists are not just a convenience; they are a powerful tool for structuring communication and information flow:

- **Creates a "Single Source of Truth":** All communication related to a specific project or team is contained within a single thread, making it easy for new members to get up to speed or for existing members to search for past information.
- **Breaks Down Silos:** By creating lists for cross-functional teams (e.g., campaign-2025@myorg.org), you ensure that everyone, from marketing to program staff, stays in the loop.

- **Streamlines Onboarding:** When a new person joins a team, you simply add them to the relevant mailing list, and they instantly get access to all previous communications.

A common pitfall is to confuse internal mailing lists with external marketing email lists (e.g., platforms like Mailchimp or Constant Contact). While both use email, internal lists are for private, team-based collaboration, while external lists are for public-facing communications with donors, volunteers, and supporters.



"Global Health Initiative" Awareness Campaign

The Challenge: "Global Health Initiative," a large international SEO, needed to coordinate a nationwide health awareness campaign. With teams in different cities and departments, communication silos were a major challenge. The marketing team might not be aware of a new program in another region, leading to inconsistent messaging.

The Solution: They created a central mailing list for all campaign members and a shared calendar to track the entire project's timeline, from content creation deadlines to media outreach schedules. A member of a regional program team could easily send an email to the group to share a local success story, and the communications team would see it and be able to use it in a national campaign.

The Result: The mailing list and calendar integration broke down geographical and departmental silos. The shared view of the campaign ensured that everyone had access to the same information, leading to a more cohesive and impactful campaign with better coordination and a stronger, unified message.

Calendar Integration for Seamless Coordination

Calendar integration is the practice of connecting a mailing list or group to a shared calendar. When you invite the group to a meeting or add an event to the shared calendar, all members of that group can see the event and receive notifications, ensuring that everyone is aligned on important dates and deadlines.

This integration transforms abstract plans into actionable schedules:

- **Manages Project Timelines:** Instead of a static project plan, a shared calendar can be a dynamic, visual roadmap of deadlines and milestones. The entire team can see when content is due, when events are scheduled, and when a report needs to be submitted.
- **Simplifies Event Management:** A shared calendar for an event-planning team (e.g., events@myorg.org) ensures that all logistics, from venue bookings to speaker confirmations, are tracked in one place.
- **Improves Transparency and Accountability:** When a deadline is missed, the shared calendar provides a clear, objective record of the original plan, allowing the team to discuss and learn from the issue without pointing fingers. It promotes a culture of shared responsibility.

Practical Tools and Workflow

Most modern digital suites offer robust mailing list and calendar integration. The two most common options for SEOs are Google Workspace and Microsoft 365.

- **Google Workspace:** You can create a new Google Group (the mailing list) and then, in Google Calendar, create a shared calendar specifically for that group. When you add a member to the Google Group, they are automatically granted access to the calendar.
- **Microsoft 365:** The process is similar. You create a Microsoft 365 Group, which automatically comes with a shared inbox (the mailing list) and a shared calendar in Outlook.

Here is a practical, basic, workflow for launching a new campaign:

1. **Create a Group:** The campaign manager creates a new group called campaign-launch-2025@myorg.org.
2. **Add the Team:** The project team, including members from communications, fundraising, and program staff, is added to the group.
3. **Create a Shared Calendar:** The group's shared calendar is used to add key milestones: the content due date, the social media launch date, and a post-launch debrief meeting.

4. **Communicate and Track:** All project-related emails are sent to the group's email address, and everyone receives calendar invites for all the key events, ensuring no one misses a beat.



"Friends of the Park" Volunteer Project

The Challenge: "Friends of the Park," a local non-profit, organizes volunteer-led clean-up days. They had difficulty coordinating volunteers, with communications scattered across personal emails and a lack of a central schedule.

The Solution: They created a Google Group for all project leaders and a shared Google Calendar. When a new clean-up day was scheduled, the project manager sent an email to the group and added a calendar invite. All important updates, such as changes in weather or a new meeting time, were sent to the group email, and the shared calendar was updated instantly.

The Result: The group and calendar provided a single, organized hub for all project communications and scheduling. Volunteers knew exactly where to go for information, which reduced administrative work for the small staff and led to more successful and well-attended events.

Conclusion

Mailing lists and calendar integration are not just basic productivity tools; they are essential for building a more collaborative, transparent, and efficient SEO. By creating a centralized system for communication and scheduling, you can reduce miscommunication, streamline projects, and ensure that every team member, from a local volunteer to an executive, is working with the same information and towards the same goal. Embracing these tools is a simple yet powerful step toward strengthening your organization's internal operations and maximizing its mission.

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary difference between a mailing list (Google Group) and an external marketing email list (Mailchimp)?

- A. A mailing list is used for internal team communication, while a marketing list is for public-facing communications.
- B. A mailing list is free, and a marketing list is always paid.
- C. A mailing list can only send messages, while a marketing list can only receive them.
- D. There is no functional difference between the two.

Question 2

According to the lesson, how does calendar integration help a team manage a project?

- A. It creates a static, unchangeable timeline for a project.
- B. It provides a dynamic, visual roadmap of deadlines and milestones for everyone to see.
- C. It allows only the project manager to see the project's schedule.
- D. It automatically completes all tasks on the schedule.

Question 3

The **Global Health Initiative** case study demonstrates how mailing lists and calendar integration can help a large organization by:

- A. Replacing all face-to-face meetings with emails.
- B. Creating a new communication platform for each department.
- C. Breaking down communication silos between different departments and regions.
- D. Limiting the number of people who can work on a project.

Social economy and Impact management

Overview

Course description and aim

This course aims to introduce participants to the fundamental principles of the social economy, with a focus on those who may not be familiar with this sector and are likely or willing to collaborate with social economy organizations. The course is designed to raise awareness about the crucial role of the social economy in promoting collective well-being, equipping participants with both practical tools and theoretical knowledge to collaborate effectively with these organizations. It will explore the distinctive characteristics of socially oriented organizations, highlighting how they differ from traditional businesses. Participants will gain a clear understanding of how these organizations create both social and economic value and will learn methods for managing and evaluating social impact. Through real-world examples and case studies, participants will learn to recognize the opportunities and challenges of working with organizations that pursue societal objectives, laying the groundwork for fruitful partnerships.

Skills gap area

Participants, after completing the learning process, will be able to:

- LO1: Describe the foundation principles of social innovation and impact economy domains.
- LO2: Discuss how the concepts underlying the EU Social Economy Action Plan could affect the national socio-economic environment.
- LO3: Interpret the specific challenges characterizing the management of different forms of social economy organizations and the process of dual, socio-economic, value creation.

- LO4: Illustrate the main elements of a basic social impact assessment infrastructure for SEOs.
- LO5: Describe the main requirements to set up a successful partnership between SEOs and private/public sector organizations.

Modules

The course includes the following modules:

1. Social Economy and entrepreneurship in Europe

This course offers service providers an essential overview of the social economy, helping them understand the values that drive Social Economy Organizations (SEOs) and how these values differ from traditional business models. Service providers will learn about the different organizational forms of SEOs, and how they integrate the impact economy approach into their operations, which prioritizes social and environmental outcomes alongside financial sustainability. Additionally, the course covers tools for assessing social impact, equipping service providers with the knowledge to evaluate and support SEOs aligned with their mission. By the end of the course, service providers will be better prepared to collaborate with SEOs, ensuring that any services or partnerships created reflect the social, ethical, and community-focused values of these organizations, and contributing to a more inclusive, stakeholder-driven economy.

2. Social innovation and co-design

This module equips service providers with an understanding of Social Innovation and Co-Design to help them providing value by moving beyond the traditional organizational boundaries. It provides a strategic lens to address the challenges of creating social value that is genuinely inclusive, context-specific, and sustainable, focusing on reducing the risks associated with insufficient stakeholder engagement and non-inclusive design. The course starts by exploring the principles of Inclusive design to shape solutions accessible to all beneficiaries and continues by introducing the Basics of social innovation as a driver for systemic change. It then focuses on the Design and definition of the social model of intervention, providing frameworks to structure scalable and measurable actions. The final lesson covers key strategies for effective Stakeholder engagement throughout the Co-Design process.

3. The impact economy approach

This module provides service providers with a strategic framework for understanding and operating within the Impact Economy, moving beyond traditional profit-only metrics to embed social and environmental goals into the core of their strategy. It equips leaders with the tools to manage the shift toward impact creation while mitigating the significant risks of "impact washing" and ensuring financial viability. The course begins by defining core concepts such as impact and the triple bottom line perspective, establishing a foundation for understanding value on multiple dimensions. It then introduces the "Creating shared value" framework, focusing on integrating societal needs into business strategy. Participants will also explore the landscape of Sustainable & Impact finance and understand the opportunities and challenges posed by these funding mechanisms. Furthermore, the module details the various Configurations of private-public partnerships for social impact, showing how collaborative models can be leveraged for scale. The final lesson critically addresses Impact reporting and the risk of "washing", providing methods for transparent and credible disclosure of social and environmental performance.

4. Social impact assessment tools

This module focuses on equipping service providers with the essential methodologies for measuring and managing the social value created by their organizations. The course begins by establishing the foundational Theory of change, which links activities to desired long-term impact. Building on this, participants will explore various Impact modelling and frameworks used to structure and evaluate social performance. A dedicated lesson dives into the Social Return on Investment (SROI) methodology, providing a comprehensive, monetized approach to value assessment. The final section, Strategies and tools for data gathering, focuses on practical techniques for collecting robust evidence necessary for credible impact reporting and continuous improvement.

Modules' content

The course includes **4 modules** and **18 lessons**

1. Social Economy and entrepreneurship in Europe

The module includes the following lessons:

1. *Definition of social economy organizations*
2. *The spectrum of social economy organisations*
3. *Nation-specific examples of SEOs*
4. *SEO's National Legal Framework: France*
5. *Coexistence of social and economic missions*

2. Social innovation and co-design

The module includes the following lessons:

6. *Basics of social innovation*
7. *Inclusive design*
8. *Design and definition of the social model of intervention*
9. *Stakeholder engagement*

3. The impact economy approach

The module includes the following lessons:

10. *Defining impact and the triple-bottom-line perspective*
11. *Creating shared value*
12. *Sustainable & Impact finance*
13. *Configurations of private-public partnerships (PPP) for social impact*
14. *Communicate and report your impact*

4. Social impact assessment tools

The module includes the following lessons:

15. *Theory of change*
16. *Impact modelling and frameworks*
17. *Social Return on Investment*
18. *Strategies and tools for data gathering*

Social Economy and entrepreneurship in Europe

The module includes the following lessons:

1. *Definition of social economy organizations*
2. *The spectrum of social economy organisations*
3. *Nation-specific examples of SEOs*
4. *SEO's National Legal Framework: France*
5. *Coexistence of social and economic missions*

Lesson 1

Definition of Social Economy Organizations

Expected reading time: 17 minutes

Main page content

Social Europe. What is the Social Economy?

<https://www.youtube.com/watch?v=GDSqf2Kjxi8> (1:00 min)

Social economy organisations (SEOs) represent a unique intersection between economic activity and social responsibility. Unlike conventional enterprises that often centre their objectives on financial growth and shareholder returns, SEOs emphasise principles of solidarity, collective well-being, inclusivity, and democratic governance. Their purpose-driven approach aligns with fostering community resilience and long-term societal benefits, making them key players in addressing contemporary social and environmental challenges.

Understanding Social Economy Organisations

The term "social economy" refers to a distinct sector of economic activity that brings together organisations committed to serving the collective or general interest. These organisations stand apart from conventional businesses by prioritising societal goals over profit generation. While they may engage in commercial activities, their primary aim is to reinvest surpluses into their missions, fostering community development, social cohesion, and environmental sustainability. Social economy organisations operate across various sectors, addressing diverse needs ranging from healthcare and education to environmental conservation and cultural promotion.

Around **2.8 million social economy entities** in Europe contribute to job creation, social inclusion, equal opportunities, and sustainable development. Social economy entities are private entities, independent of public authorities, and may assume various legal forms.

Social Economy Definitions

The European Economic and Social Committee (EESC) defines social economy organizations as: *"The set of private, formally-organised enterprises, with autonomy of*

decision and freedom of membership, created to meet their members' needs through the market by producing goods and providing services, insurance and finance, where decision-making and any distribution of profits or surpluses among the members are not directly linked to the capital or fees contributed by each member, each of whom has one vote."

Source: *Recent Evolutions of the Social Economy in the European Union*, <https://www.eesc.europa.eu/sites/default/files/files/qe-04-17-875-en-n.pdf>, page 11.

A significant milestone in defining and supporting social economy organization has been the European Social Economy Action Plan issued in 2021 by the European Commission, which provides the following definition: *"The social economy covers entities sharing the following main common principles and features: the primacy of people as well as social and/or environmental purpose over profit, the reinvestment of most of the profits and surpluses to carry out activities in the interest of members/users ("collective interest") or society at large ("general interest") and democratic and/or participatory governance."*

Source: *Building an economy that works for people: an action plan for the social economy*, <https://ec.europa.eu/social/BlobServlet?docId=24986&langId=en>, page 5.

Key Principles of Social Economy Organisations (SEOs)

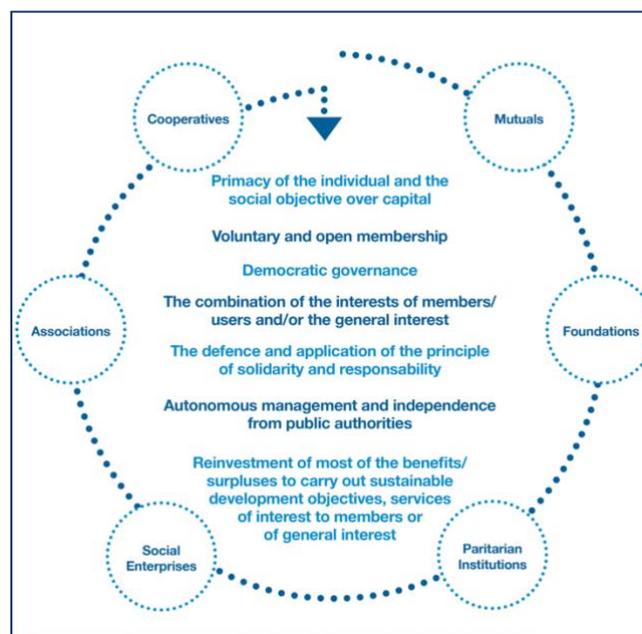


Figure 1: Social Economy Organizations. Source: Social Economy Europe.

The operational framework of SEOs is guided by several core principles that set them apart from traditional businesses:

1. Primacy of People and Social or Environmental Purpose Over Capital:

The foremost objective of SEOs is to meet the needs of individuals and communities. Unlike profit-driven enterprises, these organisations centre their activities on improving societal well-being rather than maximising returns for owners or shareholders. This principle underscores a commitment to human dignity, equity, and inclusion.

2. Reinvestment of Surpluses

Rather than distributing profits to shareholders or private owners, SEOs channel their financial surpluses back into their social missions. These funds are used to expand services, improve operational efficiency, or address emerging community needs (the interest of members/users (“collective interest”) or society at large (“general interest”)), ensuring long-term sustainability and impact.

3. Democratic Governance

Decision-making within SEOs is typically inclusive and participatory. Members, stakeholders, or employees often have equal say in shaping the organisation’s direction, fostering a sense of ownership and accountability. This democratic approach ensures that diverse perspectives are considered, leading to fairer outcomes and more resilient organisational structures.

Historical Context of the Social Economy

10 Years of Social Economy Europe

https://www.youtube.com/watch?v=jo_hYUJ5ZMA&t=2s (6:29 min)

The video summarises the history of the EU social economy movement, from its origins with the Rochdale pioneers in the 19th century, through some of its main milestones, and presents a forward-looking vision.

The history of social economy is intertwined with the evolution of economic thought and social movements, reflecting a shift towards integrating social objectives with economic activities. The roots can be traced back to the 19th century, when labour movements and cooperative societies emerged in response to industrialisation and economic inequality. These movements aimed to empower workers and promote equitable participation in economic activities. Early examples include worker-owned cooperatives, mutual aid societies, and credit unions, which sought to provide fair working conditions, financial security, and access to essential services. Over time, the social economy expanded beyond labour movements to encompass various sectors, including education, healthcare, and environmental protection.

The roles and economic impact of the Social Economy

In the face of growing social and environmental challenges, SEOs have become increasingly significant in shaping a sustainable and inclusive future. Their commitment to people-centred development and ethical practices positions them as key contributors to addressing issues such as poverty, inequality, and climate change.

The Social Economy plays a significant role in societies today:

- **Addressing Market Failures:** They often step in where traditional markets fail to meet the needs of underserved populations. For instance, they may provide affordable housing or access to essential services in low-income areas.
- **Promoting Social Inclusion:** By focusing on marginalised groups—such as people with disabilities, migrants, or the elderly—social economy organisations work to ensure equal opportunities and combat discrimination.
- **Creating Quality Jobs:** These organisations contribute significantly to employment by providing quality jobs that often emphasise fair wages and working conditions. They also facilitate the integration of disadvantaged individuals into the labour market.
- **Fostering Community Development:** Social economy organisations are deeply rooted in their communities. They engage local stakeholders in decision-making processes and contribute to community cohesion through participatory governance.

According to the EU, the social economy contributes significantly to the region's economy, employing nearly 14 million people and accounting for approximately 8% of the EU's GDP.

By providing **employment opportunities**, especially for marginalised groups, social economy organisations help reduce unemployment rates and foster economic stability within communities. Many social economy entities operate locally, reinvesting profits back into the **development of their local communities**. This localised focus helps stimulate economic growth and development at the grassroots level. Moreover, their emphasis on ethical practices has led to advancements in areas such as fair trade and sustainable business models.

Beyond Europe, the influence of SEOs is evident in various global contexts. For instance, microfinance institutions in developing countries empower underserved populations by providing access to financial services, enabling entrepreneurship and economic independence. Similarly, community-based renewable energy projects exemplify how SEOs can address environmental challenges while fostering local participation and ownership.

Challenges and Future Path

Despite their contributions, social economy organizations face several challenges:

- **Funding Limitations:** Many operate with limited financial resources and rely on grants or donations. Securing sustainable funding can be a significant hurdle.
- **Recognition and Support:** There is often a lack of recognition within broader economic policies for the unique contributions of social economy organizations. This can limit access to support networks and resources necessary for growth.
- **Regulatory Barriers:** In some regions, regulatory frameworks may not adequately support the establishment or operation of social economy entities, hindering their potential impact.

The Social Economy Action Plan

Despite their importance, social economy actors remain under-recognised in many countries, face limited access to finance, markets, and public procurement, and need stronger legal and policy frameworks. A significant milestone in defining and supporting social economy organization has been the European Social Economy Action Plan issued in 2021 by the European Commission. The plan aims to unlock the transformative potential of the social economy by improving its visibility, legal environment, financial tools, and role in the green and digital transitions, while scaling social innovation and strengthening ecosystems at all levels. In the table below, you can find the main actions foreseen by the plan. The full text is listed as an add-on reading to this module.

The action plan announces several key actions to support the social economy, for example:

- the [Council Recommendation](#) on developing social economy framework conditions.
- the [EU Social Economy Gateway](#) to provide a clear entry point for social economy stakeholders, other relevant actors and individuals seeking information on relevant EU funding, policies and initiatives.
- the [European Competence Centre for Social Innovation](#).

Social economy organizations embody a vision of economic activity that prioritizes human dignity, community well-being, and sustainability. By adhering to principles of solidarity, democratic governance, and mutual aid, these organizations offer a compelling alternative to traditional business models. As SEOs continue to evolve and expand their influence, they serve as a testament to the power of collective action and shared values in shaping a better future for all.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. European Commission. 2021. *EU Social Economy Action Plan*.
<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52021DC0778>
2. EU Social Economy Gateway. *Social economy worldwide*
https://social-economy-gateway.ec.europa.eu/about-social-economy/social-economy-worldwide_en. Accessed September 2025.
3. European Commission: Directorate-General for Employment, Social Affairs and Inclusion. 2020. *Social enterprises and their ecosystems in Europe – Comparative synthesis report – Executive summary*. <https://data.europa.eu/doi/10.2767/05369>
4. OECD. 2023. *What is the social and solidarity economy?*
https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/09/what-is-the-social-and-solidarity-economy-a-review-of-concepts_4b3d724b/dbc7878d-en.pdf
5. OECD. 2022. *Recommendation of the Council on the Social and Solidarity Economy and Social Innovation*. <https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0472%20%20>
6. European Commission: European Innovation Council and SMEs Executive Agency, CIRIEC, Euricse, Spatial Foresight, Carini, C. et al. 2024. *Benchmarking the socio-economic performance of the EU social economy – Improving the socio-economic knowledge of the proximity and social economy ecosystem*, Publications Office of the European Union, <https://data.europa.eu/doi/10.2826/880860>
<https://op.europa.eu/en/publication-detail/-/publication/8aa2a5cb-74a7-11ef-a8ba-01aa75ed71a1/language-en>

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary goal of Social Economy Organizations (SEOs)?

- A) Maximizing shareholder profits
- B) Promoting financial growth
- C) Advancing societal well-being and sustainability**
- D) Ensuring market dominance

Question 2:

Which of the following best describes the reinvestment of surpluses in SEOs?

- A) Surpluses are distributed among shareholders.
- B) Surpluses are reinvested to support their social missions.**
- C) Surpluses are used to pay high executive salaries.
- D) Surpluses are stored as financial reserves with no specific purpose.

Question 3:

How do SEOs contribute to addressing market failures?

- A) By maximizing profits in underserved areas
- B) By providing affordable services and goods to marginalized populations**
- C) By monopolizing essential service markets
- D) By outsourcing operations to reduce costs

Lesson 2

The spectrum of social economy organizations

Expected reading time: 10 minutes

Main page content

This lesson explores the organisations included in the social economy, their unique characteristics, and the shared principles that unite them.

Over the years, we have witnessed the intensification of two trajectories: charities have started to search for different funding sources, on top of grants and donations, by being more commercially oriented; and traditional for-profit sector firms have increasingly integrated social and environmental concerns alongside profit maximisation, trying to adapt themselves to threats and opportunities generated by sustainability challenges. This led to the emergence of entities that sought to **blend the achievement of a societal mission with a viable business model**, striving towards independent economic sustainability.

These are encompassed within the broader concept of the **social economy**.

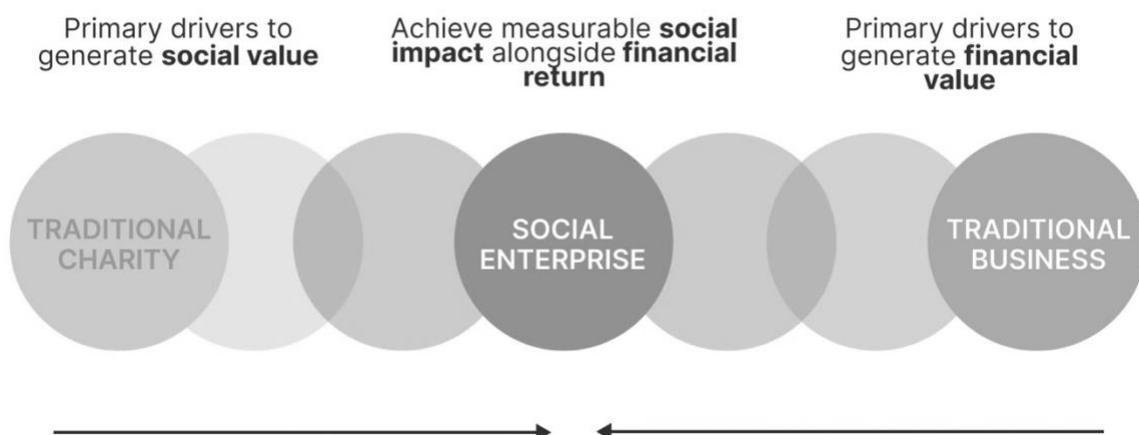


Figure 1: The emergence of social entrepreneurship.

		Purely philanthropic	Social enterprises	Purely commercial
Motives		Appeal to good-will	Mixed motives	Appeal to self-interest
Methods		Mission-driven	Mission- and market-driven	Market-driven
Goals		Social value	Social and economic value	Economic value
Key stakeholders	Beneficiaries	Pay nothing	Subsidized rates, or mix of full payers and those who pay nothing	Market-rate prices
	Capital	Donations and grants	Below-market capital, or mix of donations and market-rate capital	Market-rate capital
	Workforces	Volunteers	Below-market wages, or mix of volunteers and fully paid staff	Market-rate compensation
	Suppliers	Make in-kind donations	Special discounts, or mix of in-kind and full-price donations	Market-rate prices

Figure 2: The social entrepreneurship spectrum. *Source: Dees, 1998.*

The entities of the social economy

Traditionally, the social economy encompasses **four primary types of entities** that provide goods and services to their members or the broader community: [cooperatives](#), [mutual benefit societies](#), [associations](#) (including charities), [foundations](#), and [social enterprises](#). These organisations operate as private, independent entities with distinct legal forms and share a commitment to societal well-being and progress.

All those entities share their attempt to combine philanthropic and commercial approaches; however, they display different levels of prominence and balance between the two logics, as illustrated in the following figure. The middle of the spectrum represents an ideal level of perfect balance between social impact and economic sustainability, where a business model is driven by a societal mission and societal and economic value creation are aligned. This approach characterised the organisational form of **Social Enterprise**, which can assume a not-for-profit or profit legal form according to the specific legal framework it operates.



Figure 3: SEOs' spectrum. Source: EVPA

Below, you will find the specifics of the different entities.

Associations are non-profit legal entities founded on a membership model. While they can engage in economic activities, their operations are guided by non-profit principles, meaning profits cannot be distributed to members. They transition from the charitable domain and engage in marginal, sometimes sporadic, commercial activities as a revenue diversification strategy. Associations serve a wide array of purposes, from promoting collective interests to advancing public benefit causes.

For example, cultural associations may organize events that preserve heritage, while sports associations provide opportunities for community engagement and physical activity. Their adaptability and focus on public good make associations a vital part of the social economy landscape.

Foundations are non-profit organizations established to support charitable activities aimed at serving the common good. Often created with endowments provided by individuals, families, or corporations, foundations fund initiatives that address social, cultural, environmental, or educational challenges.

Unlike associations, foundations do not rely on a membership model. Instead, they focus on philanthropy and grant-making to drive impact. Examples include scholarships, funding for medical research, or supporting grassroots organizations.

Mutual Benefit Societies are enterprises that prioritize satisfying common needs over generating profits. These organizations provide services such as life and non-life insurance, complementary social security schemes, and other community-focused offerings. Their operations are grounded in solidarity principles, with governance structures ensuring accountability to members. Mutual societies exemplify the idea of shared risk and collective benefit. By pooling resources, they protect members from individual financial hardships and create a safety net that strengthens social cohesion.

A cooperative is an autonomous association of individuals united voluntarily to meet common economic, social, and cultural needs. Cooperatives operate through jointly owned, democratically controlled enterprises. This model ensures that members are both the beneficiaries and the decision-makers, emphasizing shared responsibility and equitable participation. Cooperatives are active across various sectors, including agriculture, housing, retail, and finance. For instance, worker cooperatives empower employees by granting them ownership and a voice in management. This approach fosters a sense of belonging and collective accountability, aligning economic activity with social welfare.

Social Enterprises are a specific type of organization within the social economy that uses entrepreneurial business methods to achieve those social or environmental goals. Unlike traditional businesses, their primary purpose is societal impact rather than profit maximization. Social enterprises reinvest most of their profits to achieve their missions, which may include addressing unemployment, reducing waste, or providing affordable healthcare. They are characterized by their innovative approaches to solving complex problems. They often challenge traditional practices and pioneer new methods for delivering impact.

<i>Deep dive into Social Enterprises</i>

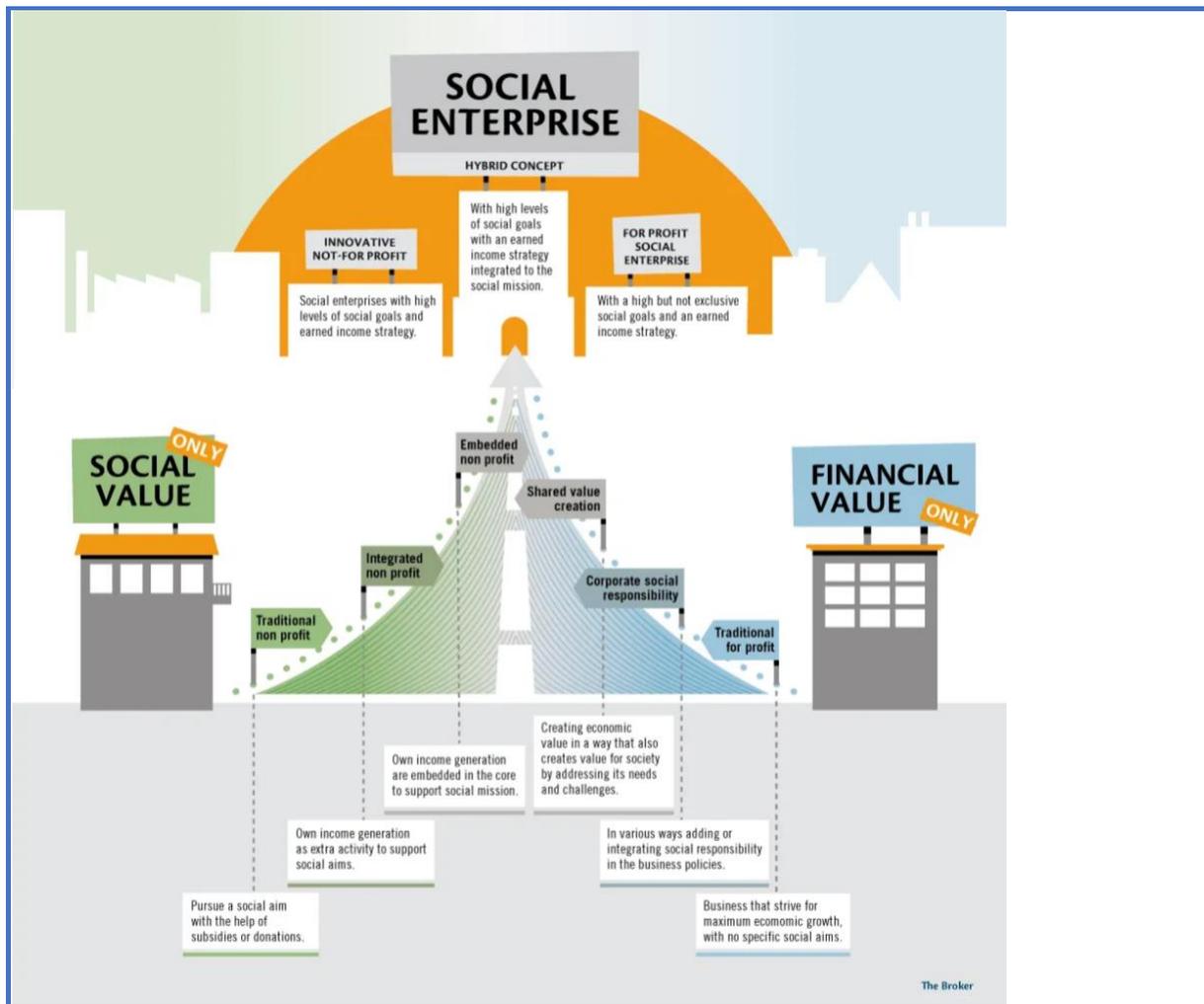


Figure 4: Movements towards social entrepreneurship. Source: The Broker Online.

According to EU Parliament 2018 recommendation to the EU Commission for adoption of a “Statute for Social and Solidarity-based Enterprises”, **social enterprises** should:

- be a private law entity established in whichever form available in the Member States and under EU law, and independent from the State and public authorities
- be focused on general interest or public utility, with a socially useful and solidarity-based activity
- be subject to an at least partial constraint on profit distribution and rules on the allocation of profits and assets, including at dissolution;
- reinvest the majority of the profits or use to achieve its social purpose
- have democratic governance models involving employees, customers and stakeholders, and Members’ power in decision-making may not be based on capital they may hold

A notable type of social enterprise is the **work integration social enterprise**. These organisations focus on creating job opportunities for marginalised groups, such as individuals with disabilities or

those experiencing long-term unemployment. Social enterprises adopt diverse legal forms depending on national regulations, reflecting their flexibility and adaptability.

Legal and Policy Frameworks

The social economy operates within diverse legal and policy contexts. National policies also play a critical role. Countries may offer tax incentives, grants, or technical support to entities that align with social economy principles. Such measures not only enhance operational capacity but also create an enabling environment for innovation and collaboration.

In some countries, the distinct aspects of the SE ecosystem are integrated – for example, cooperatives, social enterprises, associations, mutual societies, and foundations recognise themselves as part of the same phenomenon – into a comprehensive and substantial approach to legal frameworks. Countries where the SE ecosystem is developed but not integrated tend to prioritise legislation concerning specific entities. In these nations, the SSE ecosystem exists but is not yet fully supported by tailored policies that could foster a higher level of integration among its various components.

In the European Union the definition and recognition of social enterprises are supported by regulations like Article 2 (1) (13) of the ESF+ Regulation.

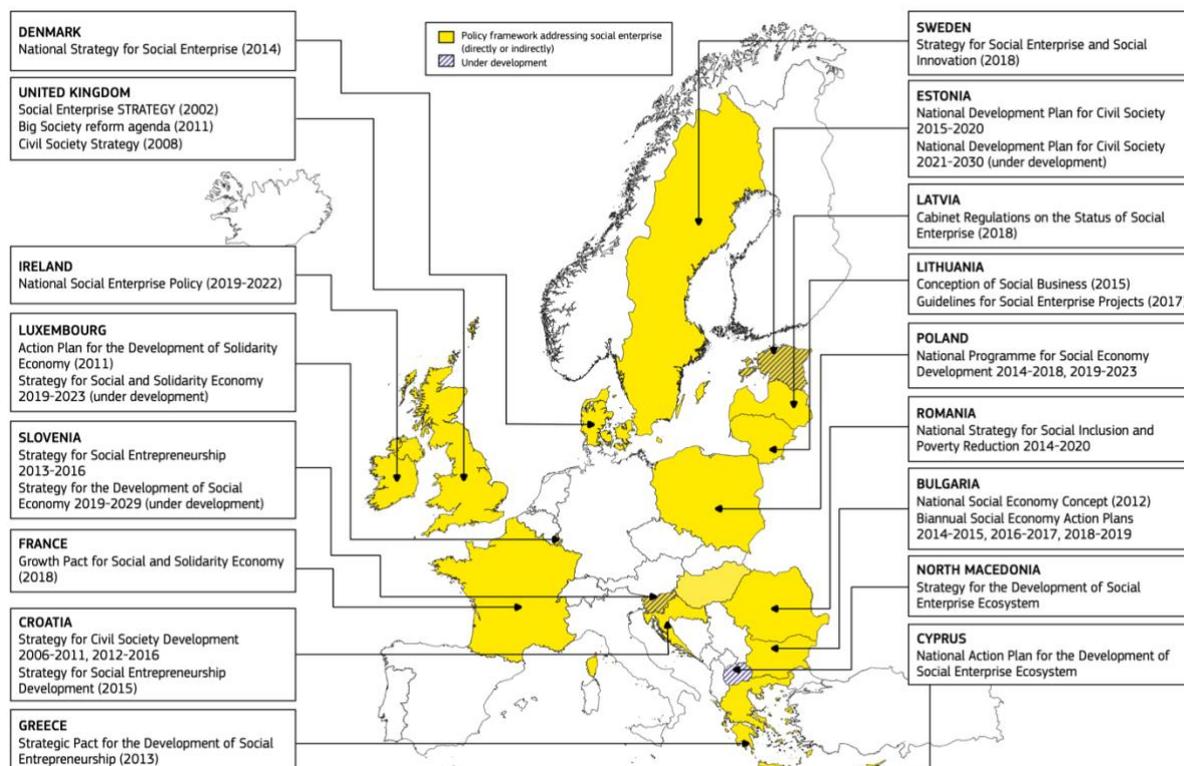


Figure 5: Countries with laws on specific legal forms or statuses for social enterprises. Source: EU Commission. 2020. *Social enterprises and their ecosystems in Europe.*

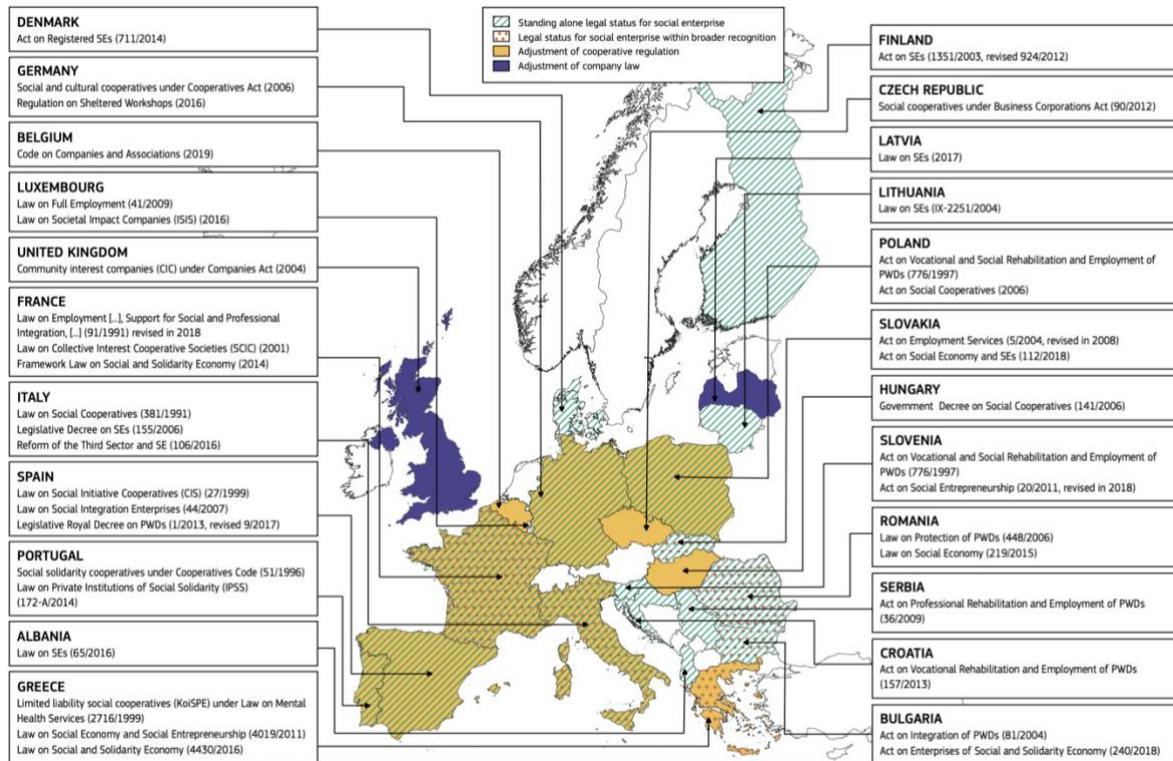


Figure 6: Countries with laws on specific legal forms or statuses for social enterprises. Source: EU Commission. 2020. *Social enterprises and their ecosystems in Europe.*

Conclusion

The spectrum of social entrepreneurship highlights the diverse ways in which organizations address societal challenges. Whether operating as a nonprofit with income-generating activities, a social enterprise, or a business with social impact goals, these organizations demonstrate that profit and social value can coexist.

As you reflect on this lesson, consider where your own interests or initiatives might fall on the spectrum.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. OECD. 2023. *Policy Guide on Legal Frameworks for the Social and Solidarity Economy, Local Economic and Employment Development (LEED)*, OECD Publishing, Paris, <https://doi.org/10.1787/9c228f62-en>.
2. https://www.oecd.org/en/publications/policy-guide-on-legal-frameworks-for-the-social-and-solidarity-economy_9c228f62-en.html
3. Schwab Foundation for Social Entrepreneurship and the World Economic Forum. 2024. *The State of Social Enterprise: A Review of Global Data 2013–2023*. https://www3.weforum.org/docs/WEF_The_State_of_Social_Enterprise_2024.pdf
4. European Commission: European Innovation Council and SMEs Executive Agency, CIRIEC, Euricse, Spatial Foresight, Carini, C. et al. 2024. *Benchmarking the socio-economic performance of the EU social economy – Improving the socio-economic knowledge of the proximity and social economy ecosystem*, Publications Office of the European Union, <https://data.europa.eu/doi/10.2826/880860>
5. <https://op.europa.eu/en/publication-detail/-/publication/8aa2a5cb-74a7-11ef-a8ba-01aa75ed71a1/language-en>
6. *Social Enterprise in Context - Hybrid Spectrum*
7. <https://www.4lenses.org/book/export/html/81/>

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

Which of the following entities is NOT traditionally considered part of the social economy?

- A) Cooperatives
- B) Mutual Benefit Societies
- C) Private Corporations**
- D) Associations

Question 2

What is a key characteristic of social enterprises?

- A) Profit maximization for shareholders**
- B) Prioritizing social and environmental objectives
- C) Reliance on government funding
- D) Excluding innovation in their operations

Question 3

How do social economy organizations typically measure their effectiveness?

- A) By comparing profits with private sector benchmarks
- B) Through tools like Social Return on Investment (SROI) and impact assessments**
- C) By reducing community involvement to improve efficiency
- D) Exclusively relying on government evaluations

Lesson 3

Nation-specific examples

Expected reading time: 10 minutes

Main page content

This lesson examines national examples of social economy and entrepreneurship across Europe, showcasing how these initiatives contribute to social cohesion, sustainable development, and economic resilience.

SPAIN: COOPERATIVES DRIVING ECONOMIC DEMOCRACY

MONDRAGON Corporation

<https://vimeo.com/187802604> (3:03 min)

This video provides an overview of MONDRAGON Corporation's cooperative model and its global impact.

Spain is home to one of the world's most prominent social economy success stories: the [Mondragón Corporation](#) in the Basque Country. Established in 1956, Mondragón is a federation of worker cooperatives spanning various sectors, including manufacturing, finance, retail, and education. It is composed of over 90 cooperatives employing more than 80,000 people. Each worker-member has a say in decision-making processes and shares in the profits. The corporation has played a key role in fostering economic development in the Basque region while maintaining a strong commitment to social equity and sustainability. Beyond Mondragón, Spain has a robust cooperative movement supported by regional and national policies that promote the social economy, such as the Spanish Social Economy Act (2011).

FRANCE: MUTUALISM AND FOUNDATIONS SUPPORTING SOCIAL INNOVATION

France has a long tradition of social economy institutions, particularly in mutual societies and associations. One notable example is the **Mutualité Française**, a network of mutual societies providing health and social services. It covers millions of citizens with affordable healthcare solutions and embodies solidarity principles.

The French government actively supports the social economy through initiatives like the **ESS Pact (Economie Sociale et Solidaire)**, which fosters partnerships between public and private actors to scale social innovation.

ITALY: SOCIAL COOPERATIVES CREATING INCLUSIVE OPPORTUNITIES

Italy's social economy is well-regarded for its social cooperatives, which are legally recognised entities designed to deliver social services or integrate disadvantaged individuals into the workforce. Italy's **Law 381/1991** played a crucial role in institutionalizing social cooperatives, offering them legal recognition and fostering their growth. Today, there are over 12,000 social cooperatives in Italy, employing nearly 500,000 people. These cooperatives play a key role in sectors such as healthcare, education, and environmental sustainability.

AUSTRIA: STRONG POLICY FRAMEWORK

Magdas Hotel

https://www.youtube.com/watch?v=q_AHgPZMHkQ (4:37 min)

This video showcases Magdas Hotel's innovative approach to hospitality and social integration, emphasizing its employment of refugees.

[Magdas Hotel](#) in Vienna is a social enterprise operated by Caritas Austria that employs refugees alongside hospitality professionals. It serves as an example of inclusive business practices. Its mission is to integrate refugees into society by providing them with meaningful employment opportunities. Profits from the hotel are reinvested into training programs for refugees and expanding similar initiatives. Magdas Hotel has successfully combined high-quality hospitality services with significant social impact by empowering marginalized groups.

Austria has a strong policy framework to support social economy and enterprises. The Austrian Social Economy Association (Interessensvertretung Gemeinnütziger Organisationen) provides advocacy and resources for social economy organizations. Additionally, funding opportunities such as grants and low-interest loans are available for social enterprises through initiatives like the **AWS Social Business** Call, which supports innovative projects that address social challenges.

SLOVENIA: A THRIVING COOPERATIVE AND SOCIAL ENTERPRISE ECOSYSTEM

Zadruga Dobrina

<https://www.youtube.com/watch?v=X29SJrr3Tts> (1:08 min)

This video showcases Zadruga Dobrina, a cooperative based on sustainable agriculture and local self-sufficiency, emphasizing their commitment to providing fresh, locally sourced produce.

Slovenia has been developing a vibrant social economy, with a focus on cooperatives and social enterprises that address community needs. The **Social Entrepreneurship Act (2011)**

in Slovenia provides a legal framework to support and regulate social enterprises. It defines key criteria for social entrepreneurship and offers financial incentives, such as tax benefits and access to public procurement opportunities, to encourage growth in the sector. Moreover, the country's cooperative movement is robust, especially in agriculture and housing, where member-owned organizations promote sustainable practices and affordability.

THE NETHERLANDS: CIRCULAR ECONOMY AND SOCIAL ENTERPRISES

The Netherlands' social economy is closely tied to sustainability and the circular economy. Social enterprises like [Fairphone](#), which produces ethically sourced and repairable smartphones, exemplify the country's commitment to environmental and social responsibility. It aims to create a fairer electronics supply chain by focusing on sustainability and workers' rights. To reduce environmental harm and improve labor conditions in the electronics industry, Fairphone uses conflict-free materials, ensures fair wages for workers, and designs modular phones to extend product lifespans. The company has set new standards for ethical production in the tech industry while raising consumer awareness about sustainable electronics.

Conclusion

The social economy in Europe is diverse and dynamic, reflecting the unique histories, cultures, and policy environments of each country. From Spain's worker cooperatives to the Netherlands' environmentally focused social enterprises, these examples demonstrate the potential of social economy initiatives to address pressing societal challenges while fostering economic resilience. These resources provide valuable insights into how different countries are harnessing the power of social entrepreneurship to promote sustainable development within their communities.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Euronews. *Europe grow its social economy?*
<https://www.euronews.com/video/2023/06/21/putting-people-first-how-can-europe-grow-its-social-economy>.
 2. *In my country. Find out more about the social economy in your country.*
https://social-economy-gateway.ec.europa.eu/my-country_en
-

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary principle behind Mondragón Corporation's cooperative model in Spain?

- A) Centralized decision-making and profit maximization
- B) Democratic governance, profit-sharing, and community investment**
- C) Government control and regulation
- D) Individual entrepreneurship without community involvement

Question 2

What is a key feature of the Community Interest Companies (CICs) introduced in the United Kingdom?

- A) Profits are reinvested into the community to achieve social objectives**
- B) They operate exclusively in the manufacturing sector
- C) CICs are required to be owned by the government
- D) They prohibit partnerships with non-profit organizations

Question 3

What makes Fairphone, a Dutch social enterprise, stand out in the context of the social economy?

- A) Focusing on luxury smartphone designs
- B) Developing agricultural equipment for low-income farmers
- C) Engaging in exclusive partnerships with fossil fuel companies
- D) Emphasizing sustainability and fair labor practices in electronics production**

Lesson 4

SEO's National Legal Framework: France

Expected time effort: 10min

Main page content

Introduction to Social Economy Organisations in France

The legal framework governing Social Economy Organisations (SEO) in France is designed to differentiate these entities from traditional commercial enterprises. The landmark legislation, the **Social and Solidarity Economy (SSE) Act of 2014**, formally recognizes the unique characteristics of the SSE. This act emphasizes that these organizations generate economic wealth while addressing social and environmental needs. The SSE encompasses a diverse range of entities, including associations, cooperatives, foundations, mutual societies, and certain commercial enterprises that prioritize participative governance and limit profit-making.

The SSE Act is founded on several core principles. **Participative governance** is a hallmark of the SSE, ensuring that decision-making is democratic and inclusive, where every member has a voice, regardless of their financial investment. Moreover, the principle of **profit lock** dictates that the majority of profits must be reinvested into the organization's activities, rather than distributed to shareholders. This ratio is to ensure social utility is prioritized over financial gain, directing resources toward meeting community needs and enhancing overall societal welfare.

Legal Status and Key Figures

The SSE in France comprises various types of entities. Associations, for instance, are groups united by a common goal, typically operating in social, cultural, or sporting fields. A notable example is **Emmaüs**, an association dedicated to combating poverty and providing housing and employment opportunities for vulnerable individuals. In France, there are approximately 1.5 million active associations, with about 170,000 serving as employers and a total budget of 113 billion euros. Notably, 25% of these associations focus on sports, 20% on culture and entertainment, and 19% on leisure activities. In Europe, the number of associations reaches around 3.8 million.

Foundations also play a crucial role in the SSE. These not-for-profit entities utilize their assets to support projects of general interest, whether social, cultural, or scientific. There are approximately 5,647 foundations and endowment funds in France, with about 130,000 in Europe. A prominent example is the **Fondation Abbé Pierre**, which funds initiatives aimed at addressing inadequate housing and supporting individuals in precarious situations.

The SSE also includes limited-profit models such as cooperatives and mutual societies. Cooperatives are democratic organizations where members—whether workers, producers, or consumers—are both owners and beneficiaries. An example is **Scop-TI**, a cooperative established by former Fralib employees to produce tea and infusions, where each member participates in decision-making and shares profits equitably. France boasts around 22,600 cooperatives, while Europe has approximately 207,000.

Mutual societies offer limited-profit social protection services, primarily in the areas of health and insurance. Governed democratically, these organizations reinvest surplus funds to improve services. In France, 272 mutual societies are employing around 55,000 people. The *Mutuelle Générale de l'Éducation Nationale (MGEN)* is an example, providing health and provident services to education professionals while being collectively managed by its members.

Weight of the Social Economy in the French and European Economies

The SSE has a significant impact on the French economy, employing approximately 2.6 million individuals, with 67% being women. Between 2020 and 2022, the sector created 81,000 jobs, reflecting its capacity for economic resilience and growth. Notably, 85% of SSE organizations have their headquarters outside the Île-de-France region, highlighting the sector's strong regional roots and its contribution to local economies, especially in rural and underserved areas.

The turnover generated by the social economy in the EU reached at least 912.9 billion euros in 2021, with France, Italy, Spain, and Finland leading in terms of cooperative sector turnover. This highlights the sector's economic significance, particularly in areas such as agriculture, consumer services, and labor.

Differentiation from the State and Traditional Market Enterprises

Social economy organizations distinguish themselves from state institutions and traditional market players through their unique governance structures and objectives. Unlike government entities, which may operate under bureaucratic constraints, SEOs are governed democratically, directly involving their members in decision-making processes. This participatory governance fosters a sense of ownership and accountability among members.

Furthermore, while traditional businesses primarily focus on profit maximization, the social economy emphasizes the creation of social and environmental value. The impact of these organizations extends beyond mere financial performance, as they prioritize addressing community needs and enhancing societal well-being. The concept of social innovation is integral to the SSE, enabling these organizations to develop novel solutions for social issues inadequately addressed by existing market or public services.

Examples abound, illustrating how SEOs implement social innovation to tackle pressing societal challenges. For instance, renewable energy cooperatives enable citizens to actively engage in the energy transition, while community-driven agricultural cooperatives ensure fair prices for small-scale farmers.

Conclusion

The legal framework for social economy organizations in France is not only foundational in promoting social and environmental objectives but also essential in shaping the economic landscape. By prioritizing participative governance, limited profitability, and social utility, the SSE plays a vital role in addressing contemporary societal challenges while fostering economic resilience. Understanding this framework equips participants with the knowledge necessary to navigate the complexities of social enterprises effectively.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. European Commission: European Innovation Council and SMEs Executive Agency, CIRIEC, Euricse, Spatial Foresight, Carini, C. et al. 2024. *Benchmarking the socio-economic performance of the EU social economy – Improving the socio-economic knowledge of the proximity and social economy ecosystem*, Publications Office of the European Union, <https://data.europa.eu/doi/10.2826/880860>
<https://op.europa.eu/en/publication-detail/-/publication/8aa2a5cb-74a7-11ef-a8ba-01aa75ed71a1/language-en>
2. European Commission: Directorate-General for Employment, Social Affairs and Inclusion, Petrella, F. and Richez-Battesti, N., *Social enterprises and their ecosystems in Europe – Country report – France*, Publications Office, 2020, <https://data.europa.eu/doi/10.2767/851150>
<https://op.europa.eu/en/publication-detail/-/publication/50dd7cde-73ec-11ea-a07e-01aa75ed71a1/language-en>

Verification of the participant's understanding

Format: **Practical Exercise**

Objective:

Analyze a real-world social economy organization in France to understand its legal framework, governance structure, and social impact.

Instructions:

1. **Choose a Social Economy Organization:** Select an organization from the social economy sector, such as an association, cooperative, mutual society, or social enterprise. You can choose an organization you are familiar with or research one that interests you.
2. **Research and Prepare a Report:** Write a report (1,000 to 1,500 words) that includes the following sections:
 - a. **Introduction:** Briefly introduce the organization, including its name, location, and mission statement.
 - b. **Legal Framework:** Describe the legal status of the organization (e.g., association, cooperative, social enterprise) and how it aligns with the SSE Act of 2014 in France or relevant European legislation.
 - c. **Governance Structure:** Explain the governance model of the organization. Discuss how it involves its members in decision-making and how this model supports the principles of participative governance.
 - d. **Social and Economic Impact:** Analyze the social and economic impact of the organization. Discuss its contributions to the community, the services it provides, and any measurable outcomes related to social inclusion, environmental sustainability, or community engagement.

Lesson 5

Coexistence of social and economic mission

Expected reading time: 10 min

Main page content

What Is the Social Economy? And How Does It Work?

<https://www.weforum.org/videos/25808-people-over-profit-does-it-really-work/>
(05:10 min)

The video explains how the social economy hits the sweet spot between doing good and doing business.

The social economy represents a unique intersection where social objectives meet economic activities, creating a framework that prioritizes both societal impact and financial sustainability. This lesson examines how social enterprises manage to balance their dual mission, the challenges they face, and the opportunities that arise from the coexistence of welfare and commercial logic.

Understanding the dual mission

At the heart of any social economy entity is the dual value proposition. Unlike traditional businesses, which focus solely on economic outcomes, or non-profits, which centre on social impact, social enterprises must navigate both domains simultaneously. Their commercial value proposition (CVP) revolves around the products or services they offer, while their impact value proposition (IVP) is tied to the social change they seek to create.

For instance, a social enterprise café may combine high-quality catering services with the goal of providing meaningful employment opportunities for individuals who have experienced long-term unemployment. While customers might frequent the café for its products, the social mission amplifies its appeal, especially to ethically minded consumers.

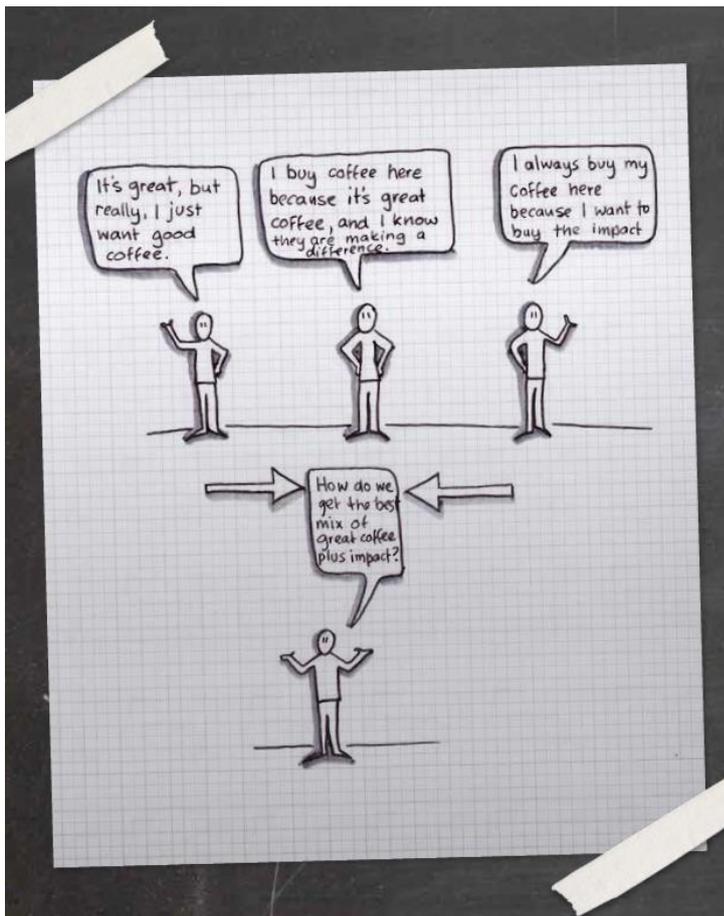


Figure: Using the Business Model Canvas for social enterprise design. Source: Ingrid Burkett Knode. <https://cscuk.fcdo.gov.uk/wp-content/uploads/2016/07/BMC-for-Social-Enterprise.pdf>

A common misconception is that generating social impact can automatically translate into economic sustainability and vice versa. However, social impact is rarely cost-neutral. Employing individuals from marginalized backgrounds, for example, may require additional resources, such as training, support systems, or adjustments to operational processes. These costs need to be factored into the business model.

Conversely, focusing solely on commercial goals without considering the social mission risks diluting the enterprise's identity. For example, if a social enterprise overemphasizes profitability, it may inadvertently undermine its impact by cutting back on programs or reducing support for its beneficiaries.

The importance of a clear (Social) Business Model

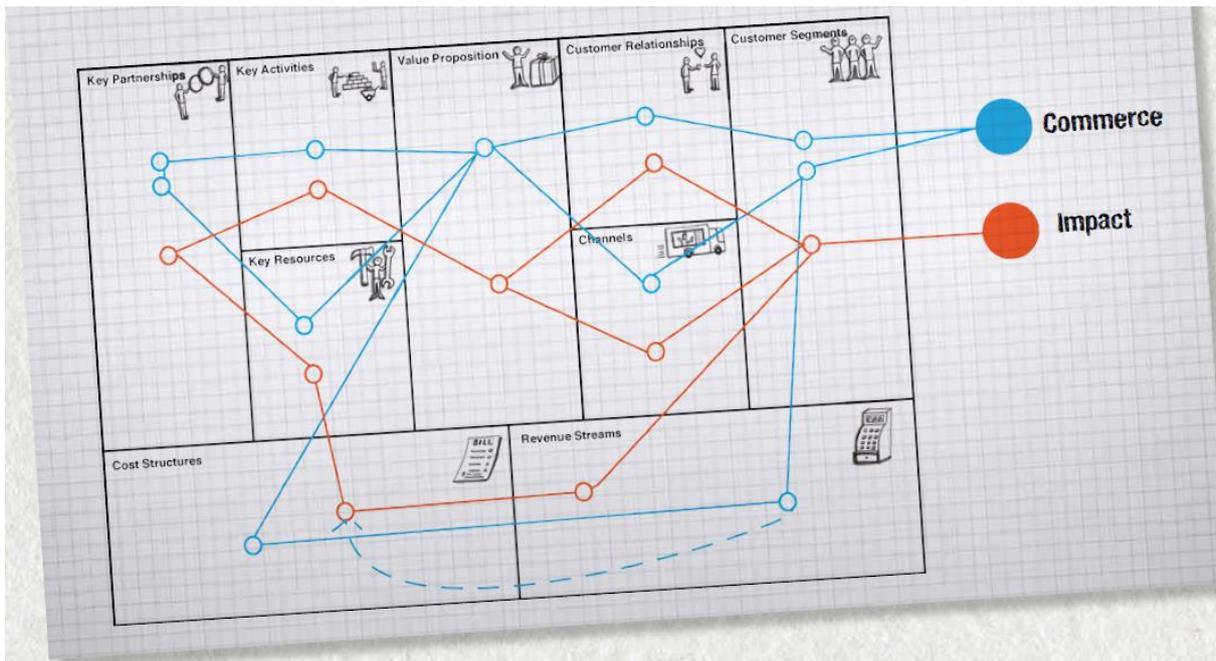


Figure 1: Using the Business Model Canvas for social enterprise design. Source: Ingrid Burkett Knode.
<https://cscuk.fcdo.gov.uk/wp-content/uploads/2016/07/BMC-for-Social-Enterprise.pdf>

The Social Business Model Canvas (SBMC) is a crucial tool for social enterprises. Tailored to their specific needs, it helps clarify the links between economic and social objectives. The SBMC highlights the importance of understanding how various components, such as customer segments, value propositions, key activities, and revenue streams, interact. The main features of SEMC that make it an alternative to the BMC include a focus on social value and building blocks that consider non-targeted stakeholders, principles of governance, involvement of customers and targeted beneficiaries, mission values, short-term objectives, and measures of impact and output (Sparviero, 2019).

For social enterprises, it is crucial to differentiate between "**impact customers**" and "commercial customers." Impact customers, namely their beneficiaries, may include governments, philanthropists, or community members supporting the social mission, while commercial customers engage with the enterprise primarily for its goods or services. First, recognizing these distinct groups helps align strategies and measure success on both fronts. Second, it is critical to articulate the social value that the organization seeks to generate as both the **social value proposition** and the commercial value proposition. Here you find a Social Business Model Canvas [template](#).

Questions to ask about the value proposition of a dual mission organization

- What value do you provide your customers? Why would they keep coming back?

- What is the relationship between your commercial value proposition and your impact value proposition?
- How visible or prominent is your impact value proposition? Who values and would pay for your impact value proposition? Who understands it?
- How do you account for / measure your value proposition (both commercial and impact)?

Overview of the Social Business Model Canvas

https://youtu.be/8aPGXqLZCS0?si=oL3_S4qSroVgT3EO (7:53 minutes)

This video introduces a broader series on using a social business model canvas to create purpose-driven businesses, also known as social enterprises.

Challenges and Opportunities

Balancing the dual mission is not without challenges. Tensions often arise when the commercial side demands efficiency and profitability, potentially clashing with the resource-intensive nature of social impact activities. For example, during peak business hours, a café might struggle to support employees who require additional assistance without compromising service quality.

- 1) **Mission Drift:** As social enterprises grow and seek profitability, there is a risk of prioritizing financial goals over their social objectives. This drift can dilute the original mission and alienate stakeholders invested in the cause.
- 2) **Funding Pressures:** Social enterprises often face pressure to demonstrate financial returns to investors while simultaneously achieving social outcomes. Balancing these expectations can be complex and challenging.
- 3) **Market Competition:** Competing in traditional markets can be difficult for social enterprises that prioritise ethical practices over profit maximisation. They may struggle against larger corporations that can offer lower prices due to economies of scale.

However, these challenges also present opportunities for innovation. By redefining customer relationships, leveraging technology, or exploring new market segments, social enterprises can address these conflicts while enhancing their overall value proposition.

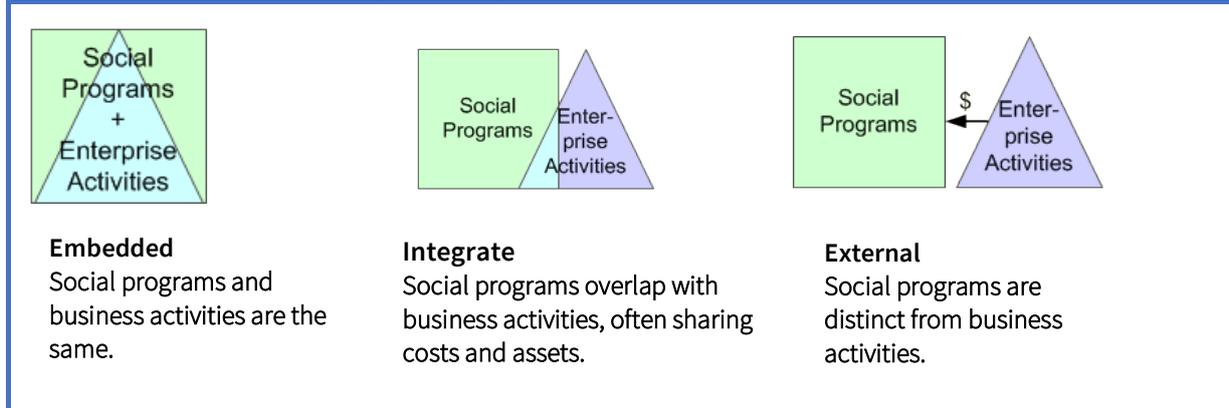
Several strategies might enable the coexistence between business and social value:

1) **Integrated Business and Impact Activities**

Aligning key activities that deliver both commercial and social value is essential. For instance, a social enterprise running a community-supported agriculture initiative can tie the sourcing of local produce directly to its mission of supporting small-scale farmers.

Level of integration between social and business activities.

Source: <https://www.4lenses.org/setypology/print/>



Embedded

Social programs and business activities are the same.

Integrate

Social programs overlap with business activities, often sharing costs and assets.

External

Social programs are distinct from business activities.

2) Symbiotic Revenue Streams

Successful social enterprises often diversify their revenue streams to support their dual goals. Alongside income from trade, grants, donations, and impact funding can help offset the additional costs of achieving social outcomes. Balancing these streams ensures long-term sustainability.

3) Effective Communication of Value Propositions

Articulating both the CVP (Commercial Value Propositions) and SVP (Social Value Propositions) to stakeholders, including customers, funders, and partners, is crucial. Ethical consumers may support a business for its impact, but the products or services must still meet high standards to retain loyalty. Sharing success stories, social return on investment (SROI) metrics, or impact reports can strengthen relationships and build trust.

4) Leveraging Partnerships

Collaborations with non-profits, government bodies, and commercial partners can amplify both social and economic outcomes. Partnerships can provide resources, scale operations, and enhance credibility. For example, a social enterprise focused on job creation might partner with vocational training organizations to ensure a steady pipeline of skilled workers.

5) Innovation and Adaptation

The dynamic nature of social enterprises demands constant innovation. The BMC is particularly helpful in identifying opportunities for growth, redesigning inefficient models, or even pivoting entirely if the existing approach fails to achieve the desired impact or financial stability.

Conclusion

The coexistence of social and economic missions in social enterprises requires careful planning, a clear understanding of business models, and a commitment to continuous adaptation. By integrating social value and commercial value creation strategically, social economy entities can achieve sustainability and make meaningful contributions to society.

By embracing innovative business models that prioritise both profit and purpose, organisations can create meaningful change while ensuring long-term viability. The Business Model Canvas adapted for dual mission organisations serves as a practical framework, helping these extraordinary businesses design solutions that are financially viable and socially impactful.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Doherty, B., Haugh, H. and Lyon, F. (2014), Social Enterprises as Hybrid Organizations. *International Journal of Management Reviews*, 16: 417-436. <https://doi.org/10.1111/ijmr.12028>
2. Muñoz, Pablo & Kimmitt, Jonathan, 2019. "Social mission as competitive advantage: A configurational analysis of the strategic conditions of social entrepreneurship," *Journal of Business Research*, Elsevier, vol. 101(C), pages 854-861.
3. Sparviero, S. (2019). The Case for a Socially Oriented Business Model Canvas: The Social Enterprise Model Canvas. *Journal of Social Entrepreneurship*, 10(2), 232-251. <https://doi.org/10.1080/19420676.2018.1541011>
4. Ingrid Burkett Knode. Using the Business Model Canvas for social enterprise design. <https://cscuk.fcdo.gov.uk/wp-content/uploads/2016/07/BMC-for-Social-Enterprise.pdf>



Verification of the participant's understanding

Format: **Practical Exercise**

Question 1

Please describe your organisation's social value proposition and commercial value proposition, listing the customers and beneficiaries. Do they overlap?

Question 2

What is the level of integration between social and business activities?

Please provide a description of the activities and why they can be considered either embedded, integrated or separated.

Format: **Forum discussion (if possible)**

Question 3

Try to explain the organisation's social business model to your team. Please contribute to the discussion by listing the question the team raised to challenge and the gap they identified in the model you proposed.

Social innovation and co-design

The module includes the following lessons:

6. Basics of social innovation

7. Inclusive design

8. Design and definition of the social model of intervention

9. Stakeholder engagement

Lesson 6

Basics of Social Innovation

Expected reading time: 8 minutes

Main page content

Social innovation refers to the development and implementation of new ideas, strategies, and solutions designed to address complex social challenges. These challenges can range from poverty and inequality to climate change and access to education. Unlike traditional approaches that often focus on short-term fixes, social innovation seeks to create sustainable, systemic change by addressing the root causes of social problems.

Social innovation is not limited to any one sector: it can emerge from governments, non-profits, businesses, or grassroots movements. What sets social innovation apart is its focus on **collaboration, inclusivity, and long-term impact**. By bringing together diverse stakeholders, including communities, policymakers, and private sector actors, social innovation fosters creative solutions that are both effective and equitable.

This lesson will explore the key concepts of social innovation, its importance in today's world, and the principles that guide successful social innovation initiatives.

By the end of this lesson, you will have a solid understanding of what social innovation is, why it matters, and how it can be applied to create meaningful change.

Social innovation definitions

*“New ideas, products, services, processes, or organizational changes that meet **social needs more effectively** and create **new social relationships**, improving the welfare and wellbeing of individuals and **communities**”.*

Mulgan, Geoff. *Social Innovation: How Societies Find the Power to Change*. 1st ed., Bristol University Press, 2019. JSTOR, <https://doi.org/10.2307/j.ctvs89dd3>. Accessed 23 Sept. 2025.

*“A **novel solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions** and for which the **value created accrues primarily to society as a whole rather than private individuals.**”*

Phills Jr., J. A., Deiglmeier, K., & Miller, D. T. (2008). Rediscovering Social Innovation. *Stanford Social Innovation Review*, 6(4), 34–43. <https://doi.org/10.48558/GBJY-GJ47>

Key aspects of Social Innovation

To understand social innovation, it's important to break down its core components:

1. **New Ideas and Solutions:** Social innovation involves developing new approaches to solving social problems. These solutions can take many forms, such as new technologies, policies, business models, or community initiatives. For example, microfinance, a system that provides small loans to low-income individuals, is a social innovation that has helped millions of people escape poverty.
2. **Systemic Change:** Unlike traditional charity or aid, social innovation aims to create systemic change by addressing the root causes of social problems. This means looking beyond immediate symptoms and working to transform the underlying structures and systems that perpetuate inequality and injustice. For instance, social innovation in education might focus on reforming school systems to ensure equitable access for all students, rather than simply providing scholarships to a few.
3. **Collaboration:** Social innovation thrives on collaboration. It brings together diverse stakeholders, including governments, businesses, non-profits, and communities, to co-create solutions. This collaborative approach ensures that solutions are grounded in the real needs and experiences of the people they are designed to serve. For example, a social innovation project aimed at improving healthcare access might involve doctors, patients, policymakers, and tech developers working together to design a new telemedicine platform.
4. **Co-Creation:** Social innovation **enhances society's overall capacity** to achieve positive outcomes. The innovation's goals (ends) are social, and its process and mechanisms (means) are also social in nature.
5. **Sustainability:** Social innovation aims to develop solutions that are not only effective but also sustainable in the long term. This means considering the environmental, economic, and social impacts of the solution and ensuring that it can be maintained and scaled over time. For example, a social innovation project focused on renewable energy might develop a community-owned solar power system that provides affordable energy while creating local jobs.

6. **Inclusivity:** Social innovation is inherently inclusive. It prioritises the needs of marginalised and underserved communities, ensuring that everyone has a voice in the design and implementation of solutions. This principle aligns closely with inclusive design, as discussed in the following lesson, and ensures that solutions are equitable and accessible to all. Indeed, not only should the outcome of social innovation foster inclusivity, but the process itself should be inclusive, considering the beneficiaries as a valuable source of innovation.

In conclusion, scholars highlight that social innovation isn't just about a new technology or process; it's about creating new social structures and ways of working to achieve positive social outcomes.

Why rethinking innovation is crucial

Rethinking how we intend innovation today, striving towards a more inclusive and sustainable concept, is relevant for several reasons:

1. **Addressing Complex Challenges:** Many of the social challenges we face today (such as climate change, inequality, and access to healthcare) are complex and interconnected. Traditional approaches often fail to address these challenges effectively because they focus on isolated symptoms rather than systemic causes. Social innovation, with its emphasis on systemic change and collaboration, offers a more holistic and effective approach.
2. **Empowering Communities:** Social innovation empowers communities by involving them in the design and implementation of solutions. This not only ensures that solutions are relevant and effective but also builds local capacity and resilience. For example, a social innovation project aimed at improving food security might involve local farmers in developing sustainable agricultural practices, thereby empowering them to take control of their own food systems.
3. **Driving Economic Growth:** Social innovation can also stimulate economic growth by creating new markets, generating jobs, and fostering business opportunities. For example, the rise of social enterprises, businesses that prioritize social and environmental impact alongside profit, has created a new sector of the economy that generates both financial and social value.

4. **Promoting Equity and Justice:** By focusing on inclusivity and systemic change, social innovation promotes equity and justice. It challenges existing power structures and works to create a more just and equitable society. For example, social innovation in criminal justice might focus on restorative justice programs that address the root causes of crime and reduce recidivism rates.

Principles of successful Social Innovation

1. **User-Centered Design:** Like inclusive design, social innovation prioritizes the needs and experiences of the people it aims to serve. This means involving end-users in every stage of the design process, from problem identification to solution implementation. For example, a social innovation project aimed at improving public transportation might involve commuters in designing new routes and services.
2. **Collaboration and Partnerships:** Social innovation requires collaboration across sectors and disciplines. By bringing together diverse stakeholders, social innovation initiatives can leverage a wide range of expertise, resources, and perspectives. A social innovation project aimed at reducing plastic waste might involve environmental scientists, policymakers, businesses, and community groups working together to develop and implement new recycling systems.
3. **Scalability and Adaptability:** Successful social innovation initiatives are designed to be scalable and adaptable. This means creating solutions that can be expanded to reach more people and adapted to different contexts. A social innovation project that develops a successful model for affordable housing in one city might be adapted and scaled to other cities with similar challenges.
4. **Focus on Impact:** Social innovation is driven by a focus on impact. This means setting clear goals, measuring progress, and continuously refining solutions to maximize their effectiveness. A social innovation project aimed at improving literacy rates might set specific targets for student achievement and regularly assess its impact to ensure it is meeting its goals.
5. **Sustainability:** As mentioned earlier, sustainability is a key principle of social innovation. This means designing solutions that are environmentally, economically, and socially sustainable over the long term. A social innovation project aimed at improving access to clean water might develop a community-managed water system that is both affordable and environmentally friendly.

Examples of Social Innovation in Action

Here are other detailed examples regarding how social innovation is being implemented in real-world contexts:

1. **Grameen Bank – Microfinance for Poverty Alleviation**

Founded by Muhammad Yunus in Bangladesh, Grameen Bank is one of the most well-known examples of social innovation. The bank provides small loans (microcredit) to low-income individuals, particularly women, who lack access to traditional banking services. These loans enable borrowers to start small businesses, such as selling handicrafts or farming, and improve their economic conditions. What makes Grameen Bank innovative is its focus on trust-based lending—loans are given without collateral, and repayment rates are exceptionally high. This model has empowered millions of people, especially women, to lift themselves out of poverty and has inspired similar microfinance initiatives worldwide.

2. **Fair Trade – Ethical Consumerism**

The fair-trade movement is a global social innovation that aims to promote better trading conditions and sustainable farming practices. Fair trade ensures that farmers and workers in developing countries receive fair prices for their products, such as coffee, cocoa, and textiles. By providing fair wages and safe working conditions, fair trade helps to reduce poverty and promote sustainable development. For example, fair trade coffee cooperatives in Latin America have enabled small-scale farmers to compete in global markets while maintaining environmentally friendly farming practices. This model not only improves the livelihoods of farmers but also encourages consumers to make ethical purchasing decisions.

3. **Khan Academy – Revolutionizing Education**

Khan Academy is a non-profit educational platform that provides free, high-quality online courses to students around the world. Founded by Salman Khan, this social innovation addresses the global challenge of unequal access to education. Khan Academy offers courses in subjects ranging from math and science to history and economics, all available in multiple languages. The platform uses interactive videos, practice exercises, and personalized learning tools to help students learn at their own pace. By making education accessible to anyone with an internet

connection, Khan Academy has transformed the way people learn and has bridged the gap for students in underserved communities.

4. **The Ocean Cleanup – Tackling Plastic Pollution**

The Ocean Cleanup is a social innovation project founded by Boyan Slat, a young entrepreneur from the Netherlands. The project aims to address the global problem of plastic pollution in the oceans by developing advanced technologies to remove plastic waste. One of their innovations is a large, floating system that captures plastic debris from the ocean's surface. The collected plastic is then recycled into new products, creating a circular economy. The Ocean Cleanup not only helps to clean the oceans but also raises awareness about the importance of reducing plastic consumption and waste. This project demonstrates how social innovation can combine technology, environmental sustainability, and public engagement to tackle complex global challenges.

5. **Formigas-de-embraúba – Reforestation**

Formigas-de-embraúba is a Brazilian NGO that creates mini-forests in public schools using MapBiomass' technology while educating a new generation of conservationists.

6. **Restorative Justice – Transforming Criminal Justice Systems**

Restorative justice is a social innovation that seeks to transform traditional criminal justice systems by focusing on repairing harm rather than punishing offenders. This approach involves bringing together victims, offenders, and community members to discuss the impact of a crime and agree on steps to make amends. For example, in New Zealand, restorative justice programs have been successfully integrated into the youth justice system, reducing recidivism rates and promoting healing for victims. By addressing the root causes of crime and fostering dialogue, restorative justice offers a more humane and effective alternative to incarceration.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Goldberg, D. (2013). Social Innovation: What It Is and What It Isn't. Stanford Social Innovation Review. <https://doi.org/10.48558/BNT8-GC68>
2. Schwab Foundation. The Future is Collective: Case Studies of Collective Social Innovation. 2025. https://reports.weforum.org/docs/WEF_The_Future_is_Collective_Case_Studies_of_Collective_Social_Innovation_2025.pdf
3. WEF. 2024. How to successfully orchestrate collective action. <https://www.weforum.org/stories/2024/05/successfully-orchestrate-collective-action/>
4. Grant, H. M. L. (2013). The Five Stages of Social Innovation at Scale. Stanford Social Innovation Review. <https://doi.org/10.48558/ATQ3-KD38>

Verification of the participant's understanding

Format: **Practical exercise**

Please identify an example of social innovation and explain how it applies the different key aspects of the social innovation paradigm.

Lesson 7

Inclusive design

Expected reading time: 10 minutes

Main page content

Inclusive design is a philosophy and practice that aims to create products, services, and environments that are accessible and usable by as many people as possible, regardless of their age, ability, or background. Unlike traditional design approaches, which often focus on the "average" user, inclusive design considers the full spectrum of human diversity. This includes people with disabilities, the elderly, and those from different cultural or socioeconomic backgrounds. Inclusive design is not just about meeting accessibility standards—it's about **creating solutions that empower everyone and ensure no one is left behind.**

Accessibility vs. Inclusive Design

<https://youtu.be/hE83Qn-PTGA> (4:38 min)

"Accessible design" and "inclusive design" are often used interchangeably. While they are related, their focuses are different.



Figure 1: Defining inclusive design. Source: Venngage.

In the context of social innovation and co-design, inclusive design is particularly important. Social innovation aims to address complex social challenges, and co-design involves collaborating with communities to develop solutions that meet their specific needs. By incorporating inclusive design principles, social innovators can ensure that their solutions are equitable, sustainable, and meaningful. This lesson will explore the principles of inclusive design, its importance in social innovation, and practical strategies for implementing it in co-design projects.

Core principles of Inclusive Design

Inclusive design is guided by several key principles that ensure solutions are accessible and equitable. These principles are not just theoretical: they provide a practical framework for designing with diversity in mind.

1. **Diversity and Inclusion:** Inclusive design starts with recognizing and embracing the full range of human diversity. This includes physical, cognitive, and cultural differences. For example, a website designed with inclusive principles might offer multiple ways to navigate content, such as keyboard shortcuts for people who cannot use a mouse and screen reader compatibility for visually impaired users. By considering diverse needs from the outset, designers can create solutions that are truly inclusive.
2. **Flexibility:** Inclusive design solutions are flexible and adaptable, allowing users to interact with them in ways that suit their individual needs. For instance, a mobile app might offer customizable font sizes and color contrasts to accommodate users with visual impairments or preferences. Flexibility ensures that the design can be tailored to meet the unique needs of each user, rather than forcing users to adapt to a one-size-fits-all solution.
3. **Simplicity:** Inclusive design prioritizes simplicity and clarity. Complex designs can create barriers for users with cognitive disabilities or those who are not tech-savvy. By keeping designs simple and intuitive, designers can ensure that their solutions are accessible to a wider audience. For example, a public transportation app might use clear icons and straightforward language to help users quickly find the information they need.
4. **Equity:** Inclusive design aims to provide equal access and opportunity for all users. This means avoiding solutions that favor one group over another. For example, a

public transportation system designed with equity in mind would provide accessible entrances, audio announcements, and clear signage for all passengers, not just those with disabilities. Equity ensures that everyone can benefit from the solution, regardless of their individual circumstances.

5. **User-Centered:** Inclusive design is inherently user-centered. It involves engaging with diverse users throughout the design process to understand their needs, preferences, and challenges. This collaborative approach ensures that the final solution is truly inclusive and meets the needs of the people it is intended to serve. For example, when designing a new community center, architects might work closely with local residents, including people with disabilities and elderly individuals, to ensure the space is accessible and welcoming for everyone.

Why Inclusive Design Matters in Social Innovation

Inclusive design is a natural fit for social innovation because both fields share a commitment to equity, sustainability, and community empowerment. Social innovation seeks to address systemic social challenges, and inclusive design ensures that the solutions developed are accessible to everyone, especially those who are often marginalized or excluded.

For example, consider a social innovation project aimed at improving access to education in underserved communities. An inclusive design approach would involve working closely with students, teachers, and parents to understand the barriers they face. The resulting solution might include features such as multilingual content, offline access for areas with limited internet connectivity, and materials designed for students with learning disabilities. By designing inclusively, the project can have a broader and more lasting impact.

Inclusive design also fosters collaboration and co-creation, which are central to social innovation. By involving diverse stakeholders in the design process, social innovators can ensure that their solutions are grounded in the real needs and experiences of the communities they serve. This collaborative approach not only yields more effective solutions but also fosters trust and strengthens relationships among stakeholders.

Practical Strategies for Implementing Inclusive Design

Implementing inclusive design requires a thoughtful and intentional approach. Here are some practical strategies to consider:

1. **Engage Diverse Stakeholders:** Inclusive design begins with understanding the needs of diverse users. This means involving people with different abilities, ages, and

backgrounds in the design process. For example, if you are designing a community health app, you might engage with elderly users, people with disabilities, and non-native speakers to ensure the app meets their needs. By involving diverse stakeholders from the outset, you can identify potential barriers and design solutions that are truly inclusive.

2. **Conduct Accessibility Audits:** Before starting a new design project, it's important to evaluate existing solutions to identify barriers and areas for improvement. An accessibility audit might involve testing a website with screen readers, checking color contrast ratios, or assessing the usability of a physical space for people with mobility impairments. By identifying and addressing accessibility issues early in the design process, you can create solutions that are more inclusive from the start.
3. **Use Universal Design Principles:** Universal design is a related concept that focuses on creating solutions that are usable by everyone, without the need for adaptation or specialized design. For example, a universally designed building might include ramps, elevators, and wide doorways to accommodate people with wheelchairs, strollers, or luggage. By applying universal design principles, you can create solutions that are inherently inclusive and accessible to a wide range of users.
4. **Test with Real Users:** Usability testing is a critical part of inclusive design. By testing your solution with real users from diverse backgrounds, you can identify potential issues and gather valuable feedback. For instance, if you are designing a new educational platform, you might conduct usability tests with students who have different learning styles and abilities. This feedback can help you refine your design and ensure it meets the needs of all users.
5. **Iterate and Improve:** Inclusive design is an ongoing process. As you gather feedback and learn more about your users' needs, you should continuously refine and improve your solution. This iterative approach ensures that your design remains inclusive and responsive to changing needs. For example, after launching a new community app, you might regularly collect user feedback and make updates to improve accessibility and usability over time.

Inclusive Design in Action: examples and toolkit

- **The Oxo Good Grips Kitchen Tools:** These kitchen tools were designed with input from people with arthritis, resulting in products that are easy to use for people of all abilities.

The ergonomic handles and intuitive design make these tools accessible to a wide range of users.

- **Public Transportation Systems:** Many cities have implemented inclusive design principles in their public transportation systems. For example, low-floor buses and audio announcements make public transit more accessible to people with disabilities, while clear signage and multilingual information benefit all passengers.
- **Microsoft's Inclusive Design Toolkit:** Microsoft has developed a comprehensive toolkit that helps designers create products that are accessible to people with disabilities. The toolkit includes guidelines, case studies, and practical tools for inclusive design. For example, Microsoft's Xbox Adaptive Controller was designed with input from gamers with limited mobility, resulting in a product that is both functional and inclusive.
[Here you can have a look to tool and activities.](#)
- **Inclusive Design Research Centre.** An international community of open-source developers, designers, researchers, educators and co-designers who work together to proactively ensure that emerging technology and practices are designed inclusively.
<https://idrc.ocadu.ca/resources/>

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. What is Inclusive Design? An article by the Interaction Design Foundation explaining the basics of inclusive design.
<https://www.interaction-design.org/literature/topics/inclusive-design>
2. European Parliament. 2019. *European accessibility act*.
https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/disability/union-equality-strategy-rights-persons-disabilities-2021-2030/european-accessibility-act_en

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary goal of inclusive design?

- a) To create products for a specific group of users
- b) To ensure products, services, and environments are accessible and usable by as many people as possible
- c) To maximize profits by targeting niche markets
- d) To reduce production costs

Question 2

Which of the following best describes the main difference between inclusive design and accessible design?

- a) Inclusive design focuses on meeting legal requirements, while accessible design goes beyond compliance.
- b) Inclusive design considers the needs of a wide range of people from the start, while accessible design ensures specific groups (such as people with disabilities) can use the product.
- c) Inclusive design applies only to digital products, while accessible design applies only to physical spaces.
- d) Inclusive design is more expensive than accessible design.

Format: **Scenario discussion** (and forum contribution, if possible)

Question 3

In 2018, Shopify illustrator Meg Robichaud wrote a modest [Medium post](#) that guided readers through the company's shortcomings and lessons learned from their previous illustration guide. In this post, Meg states that merely changing people's skin tone to purple doesn't resolve the issue of diverse representation.

Do you agree with the statements? Which elements would you consider from the perspective of inclusive design?

Lesson 8

Design and definition of the social model of intervention

Expected time effort: 10 minutes

Main page content

In today's context, Social Economy Organisations play a crucial role in addressing complex social issues. In this video, we will explore the concept of the social model of intervention, an innovative approach that goes beyond immediate solutions to promote sustainable, long-lasting change.

The social model of intervention serves as a guide for organisations in **recognising, addressing, and solving** challenges while considering the social, cultural, and economic **specifics of the communities** in which they operate. This approach **places people and their communities at the centre of the intervention process**, aiming to create enduring impact.

A fundamental aspect of this model is its contextual and dynamic nature. Social issues differ significantly from one community to another, and solutions must be tailored to these unique contexts through collaboration with various community stakeholders. Additionally, **the social model of intervention promotes flexibility and active community participation**. It evolves as community needs change and as organizations refine their strategies based on feedback and real-world impact. Flexibility and adaptability are crucial for success, ensuring that interventions remain relevant and capable of generating meaningful, long-term outcomes. Individuals experiencing challenges firsthand are involved from the outset, contributing their experiences and insights to shape solutions. This not only enhances the effectiveness of interventions but also fosters a sense of ownership and responsibility within the community, which is vital for their continuation.

Proprietary Video Materials

The video will explore how building trust and maintaining open dialogue are crucial for the success of this model. Through practical examples, it will demonstrate how a collaborative approach can generate significant and lasting changes, effectively addressing the real needs of communities.

Video Transcript

Introduction (Slide n. 3)

In this video, we focus on a critical aspect: the design and definition of the social model of intervention. This lesson is important for understanding how Social Economy Organizations tackle specific challenges and create lasting value in collaboration with the communities they serve.

So, what do we mean by 'social model of intervention'? At its core, it's a framework that guides how social organizations identify, approach, and solve societal problems. Designing a social intervention model requires careful consideration of the specific cultural and economic context in which the organization operates.

Importantly, this model of intervention is not static. It evolves as community needs change and as organizations refine their strategies based on feedback and real-world impact. Flexibility and adaptability are crucial for success, ensuring that interventions remain relevant and capable of generating meaningful, long-term outcomes.

What is a social model of intervention? (Slide 4 - 8)

Unlike traditional models that focus solely on immediate solutions, the social model of intervention aims to create sustainable, long-term change by placing people and their communities at the center of the process.

This model is inherently context-driven. Social problems are complex and vary from one community to another. Solutions effective in one context may not work in another, even if the issues seem similar. For example, addressing food insecurity in a rural area may require different strategies than in an urban setting. By grounding interventions in the community's specific realities, organizations can ensure their actions are relevant and effective.

Collaboration is crucial in this model, occurring at multiple levels: within the community, among various stakeholders such as: government, private sector, and non-profit actors, and within the organization itself. This ensures interventions address not just isolated problems but build networks of support that can sustain impact long after formal implementation.

Flexibility is another essential component. As circumstances evolve, whether due to shifts in the local economy or changes in community dynamics, the model must adjust. This adaptability ensures interventions remain effective over time, even as community needs change.

Lastly, a key feature of the social model is its participatory nature. Unlike traditional top-down approaches, this model prioritizes the voices of community members. Those living the challenges often provide the best insights into underlying causes and feasible solutions. But what does this mean in practice, and why is it important?

The central role of the community and trust (Slide 9)

At the core of this approach is the belief that communities are active agents, not passive recipients of help. They possess unique insights and resources that are crucial for designing effective interventions. Involving the community from the outset is essential for ensuring that solutions are relevant and sustainable.

Engaging the community goes beyond merely asking for feedback; it requires genuine, ongoing dialogue built on trust and mutual respect. For instance, rather than assuming digital literacy is the main barrier in a technology initiative, engaging stakeholders might reveal systemic challenges such as internet accessibility and device affordability. When communities are involved in identifying problems and proposing solutions, interventions are more likely to be effective and embraced.

Organizations must demonstrate a genuine commitment to community well-being by being present, listening, and acting transparently. Trust is vital not just in initial phases but for long-term sustainability. Once established, trust fosters collaboration, enabling both the organization and the community to tackle new challenges together. A trusted relationship encourages the community to take ownership of solutions, sustaining interventions even after direct involvement ends.

This co-creation process fosters a sense of ownership within the community. When individuals feel they play a role in shaping interventions, they are more likely to commit to their success and sustainability. Furthermore, community members can provide valuable feedback on the intervention's effectiveness, allowing organizations to make necessary adjustments. For instance, a program designed for youth employment might initially focus on skills training but may also need to address mentorship and networking opportunities as identified through community engagement.

Conclusion (Slide 10)

In conclusion, the design of a social model of intervention requires a shift from traditional top-down methods to a collaborative, community-centered approach that prioritizes co-creation, trust, and sustainability.

Building trust and fostering relationships is central. Trust not only contributes to current interventions but lays the foundation for future collaborations, enabling long-term positive outcomes.

Achieving sustainable impact means designing interventions that generate value even after the organization steps back, building local capacity, and ensuring adaptability to changing conditions. When communities feel empowered to maintain and expand on the solutions they helped create, the impact can multiply and endure into the future.

Design Toolkit

- **Examples of data sources** to analyze specific societal challenges in different geographical areas across OECD countries.
<https://www.oecd.org/social/social-intervention-models.htm>
- **Guide on data collection strategies by the World Economic Forum.**
https://reports.weforum.org/docs/WEF_Collecting_Data_on_Social_Enterprises_2025.pdf
- **Theory of Change.** It is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It can be considered a crucial enabling tool both in designing your intervention model, planning the activities and assessing the objective achievement. Please see the following module on “Impact Measurement” for more information on how to develop a Theory of Change.
- **Five Whys approach**
<https://www.betterevaluation.org/methods-approaches/methods/five-whys>
- **Co-design Canvases**
 - [Empathy Map](#)
 - [Co-design Canvas](#)

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. OECD. 2024. *Society at a Glance 2024: OECD Social Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/918d8db3-en>.
2. SoPact. Theory of change vs logic model.
3. <https://www.sopact.com/guides/theory-of-change-vs-logic-model>
4. Funnell, Sue & Rogers, Patricia. (2011). Purposeful Program Theory: Effective Use of Theories of Change and Logic Models.
5. NESTA. 2013. *By Us, For Us: the power of co-design and co-delivery*. <https://www.nesta.org.uk/report/by-us-for-us-the-power-of-co-design-and-co-delivery/>
6. Nesta. 2019. The Collective Intelligence Design Playbook.
7. https://files.acquia.undp.org/public/migration/acceleratorlabs/Nesta_Playbook_001.pdf

Verification of the participant's understanding

Format: **Forum Contribution**

Lesson 9

Stakeholders Engagement

Expected time effort: 8 minutes

Main page content

Stakeholder engagement is a critical process in social innovation and co-design, as it involves actively involving individuals, groups, or organizations who have an interest in or are affected by a project or initiative. Stakeholders can include community members, government agencies, non-profits, businesses, and other key actors who play a role in the success of a project. **Effective stakeholder engagement ensures that diverse perspectives are considered**, builds trust, and fosters collaboration, leading to more sustainable and impactful outcomes.

In the context of social innovation, stakeholder engagement is not just a one-time activity but an **ongoing process** that requires careful planning, communication, and relationship-building. Effective stakeholder engagement requires careful planning, clear communication, and a commitment to building trust and collaboration.

This lesson will explore the importance of stakeholder engagement, the key principles for effective engagement, and practical strategies for involving stakeholders in social innovation projects.

Why Stakeholder Engagement Matters

Stakeholder engagement is vital for social innovation projects because it ensures inclusivity by amplifying the voices of marginalized and underrepresented groups. Involving diverse perspectives leads to better decision-making, more effective solutions, and stronger collaboration built on trust. Engagement also supports long-term sustainability by aligning solutions with community needs and priorities. Additionally, it helps identify risks early, allowing for proactive problem-solving and reducing conflicts. As a result, stakeholder engagement becomes both a practical and ethical necessity for achieving lasting impact.

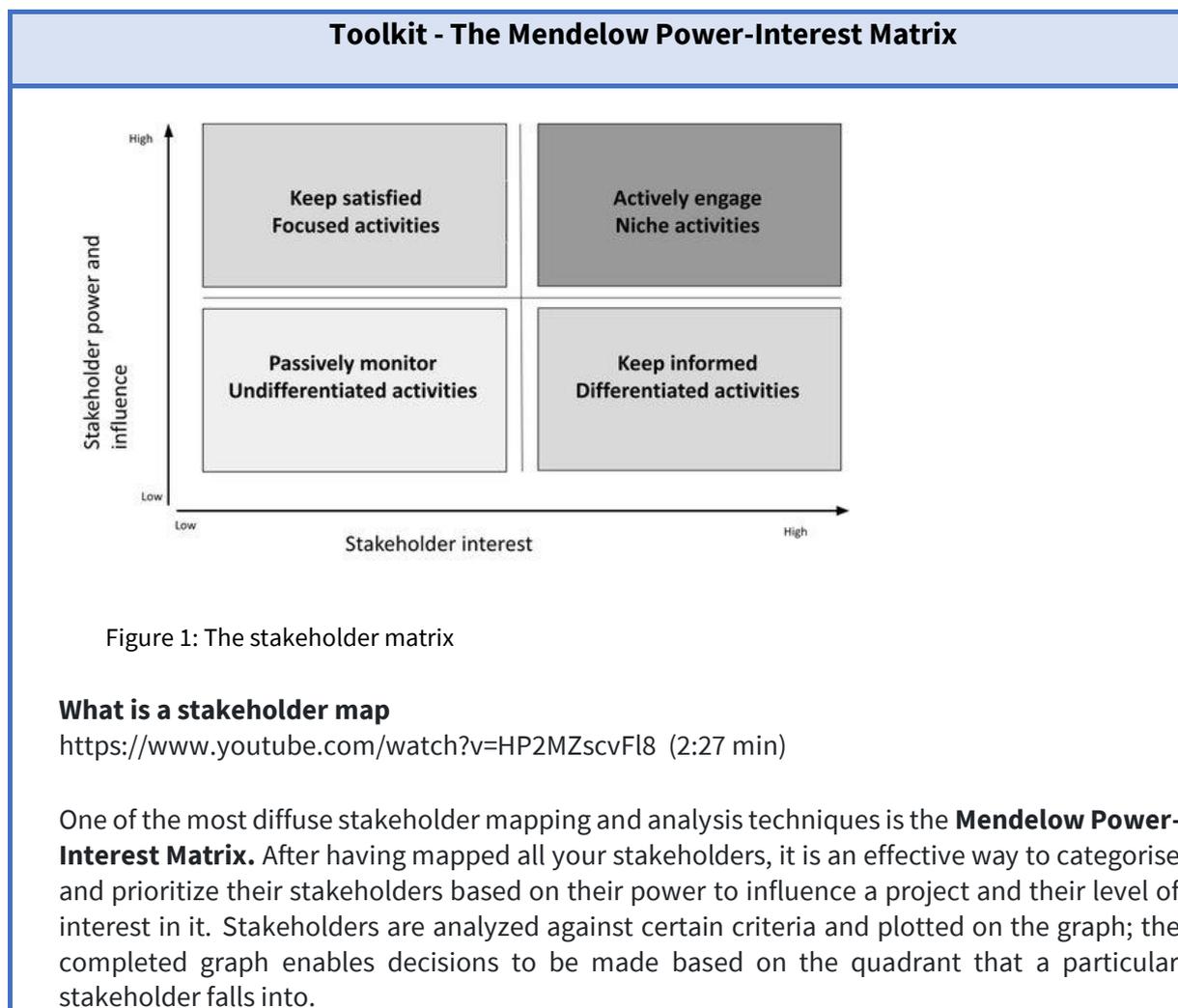
A step-by-step process for stakeholder Engagement

Implementing effective stakeholder engagement requires a thoughtful and intentional approach. Here’s a clear step-by-step **process for stakeholder engagement** that you can adapt to almost any project, program, or organisational initiative.

1. **Identify your stakeholders:** list all individuals, groups, and organizations who may affect or be affected by the project, including both **internal** (employees, managers, departments), **external** (customers, regulators, suppliers, community) and **indirect** stakeholders (e.g., advocacy groups, media).
2. **Prioritise your stakeholders:** mapping stakeholders’ interests, influence, and level of involvement in the project. This helps prioritise engagement efforts and ensures that no key stakeholders are overlooked.

What is a Stakeholder Map?

<https://www.youtube.com/watch?v=HP2MZscvFl8> (2:27 min)



The matrix is a 2x2 grid with four quadrants:

- High Power, High Interest (Manage Closely)
- High Power, Low Interest (Keep Satisfied)
- Low Power, High Interest (Keep Informed)
- Low Power, Low Interest (Monitor/Minimal Effort)

3. **Develop the engagement Strategy:** set up transparent and accessible communication channels for stakeholders to share their input and feedback. This might include **meetings, surveys, focus groups, or online platforms**. Arrange workshops or co-design sessions that enable stakeholders to participate in the design and decision-making process actively.

How to Conduct a Focus Group Discussion

https://youtu.be/CAglDsuKEEk?si=pMpcAXhbLGS9_ZNT (4:47 minutes)

4. **Monitor the relationships:** keep stakeholders informed about the project's progress and demonstrate how their **input influences** decision-making. Stakeholder engagement should be an ongoing process, not a one-time event. Maintain regular communication and involve stakeholders at key project milestones. Regular updates and feedback loops help ensure stakeholders stay engaged and feel appreciated.
5. **Report:** provide stakeholders with a report on how their input has been utilised and share **lessons learned to enhance future engagement**. Demonstrate to stakeholders how their involvement enhances the project's value and benefits their own interests. For example, in a community development project, emphasize how stakeholder input will lead to better services and facilities for the community.
6. **Sustain Engagement:** keep stakeholders updated post-project to support long-term trust and collaboration. Provide training and resources to stakeholders, enabling them to participate effectively in engagement activities. This is especially vital for marginalised or underrepresented groups who may encounter barriers to involvement.

Toolkit - Conflict resolution methods

A common challenge in stakeholder engagement is the risk of misaligned incentives among stakeholders. Conflict resolution methods can be inspiration to plan and manage situation where many different stakeholders' expectations are around the same table.

First, one of the leading causes of stakeholder conflict is unclear or unrealistic expectations. When stakeholders don't know what to expect from the project or each other, conflicts are more likely to arise. To minimize this risk, you should set clear expectations from the very beginning.

When the challenge of conflicting stakeholders' interests arise, you can use **open communication, collaborative problem-solving, mediation, and win-win solutions**, to navigate conflicts successfully.

Please read the [article](#) to discover **four practical strategies** you can refer to address stakeholder conflicts.

Key principles of effective stakeholder engagement

Effective stakeholder engagement is guided by several key principles that focus on attracting stakeholders and keeping them engaged throughout the project lifecycle:

7. **Inclusivity:** Ensure that all relevant stakeholders are identified and included in the engagement process. This includes not only those who are directly affected by the project but also those who may have indirect influence or interest.
8. **Transparency:** Be open and transparent about the goals, processes, and outcomes of the engagement. Clear communication builds trust and ensures that stakeholders understand how their input will be used.
9. **Flexibility:** Be prepared to adjust your engagement strategies in response to stakeholder feedback and evolving circumstances. Flexibility ensures that the process remains responsive to the needs of stakeholders.

Stakeholder Engagement in Action

Here are other examples of successful stakeholder engagement in social innovation projects :

- **The Participatory Budgeting Process in Porto Alegre (Brazil):** the local government implemented a participatory budgeting process that allows citizens to directly decide how public funds are spent. The government organized community meetings where residents could propose projects, debate priorities, and vote on budget allocations.
Learn more [here](#).
- **The Living Wage Campaign in the UK:** the Living Wage Campaign in the UK engaged businesses, workers, and advocacy groups to promote fair wages. The campaign addressed the problem of low wages by highlighting the benefits of paying a living wage, such as increased employee satisfaction and productivity. The organization played a key role in building consensus among stakeholders by providing evidence-based research, organizing stakeholder forums, and recognizing businesses that adopted fair wage policies.
Learn more [here](#).
- **The Smart City Initiative in Barcelona:** Barcelona's Smart Cities initiative engaged citizens, businesses, and government agencies in the development of innovative urban

solutions. The city government addressed the problem of urban challenges, such as traffic congestion and energy inefficiency, by involving stakeholders in co-designing solutions. Through participatory workshops, online platforms, and public consultations, stakeholders contributed ideas and feedback on projects related to energy efficiency, transportation, and digital innovation.

- **The Community-Led Total Sanitation (CLTS) Program** : the CLTS program engaged rural communities in improving sanitation and hygiene practices. The program addressed the problem of poor sanitation by encouraging communities to identify their own challenges and develop locally appropriate solutions. Instead of imposing top-down solutions, the organization facilitated participatory workshops where community members could discuss sanitation issues and take collective action.

The EXPLAINER, Community-Led Total Sanitation (CLTS)

https://youtu.be/lx0PwxNeGEs?si=NRcxxJ_onpMp0H0a

Conclusion

Stakeholder engagement is a cornerstone of successful social innovation and co-design. By involving diverse stakeholders in the design and implementation of projects, social innovators can ensure that solutions are inclusive, equitable, and sustainable.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Josep-Ramon Ferrer (2019). Barcelona's Smart City vision: an opportunity for transformation, *Field Actions Science Reports*, Special Issue 16.
<http://journals.openedition.org/factsreports/4367>
2. *Participatory Budgeting: A case study by the Participatory Budgeting Project*.
<https://www.participatorybudgeting.org/>
3. *Case study: Critical Tools for Relationship Management*.
<https://simplystakeholders.com/case-studies/ottawa-police/>

Verification of the participant's understanding

Format: **Scenario analysis**

The impact economy approach

The module includes the following lessons:

10. Defining impact and the triple-bottom-line perspective

11. Creating shared value

12. Sustainable & Impact finance

13. Configurations of private-public partnerships (PPP) for social impact

14. Communicate and report your impact

Lesson 10

Defining Impact and the Triple Bottom Line Approach

Expected time effort: 8 minutes

Main page content

The concept of **impact** has become a cornerstone of modern economic and organizational thinking, particularly in the context of the **impact economy**. Unlike traditional economic models that prioritize financial performance above all else, the impact economy emphasizes the creation of measurable, intentional, and positive change that addresses pressing global challenges such as poverty, inequality, and environmental degradation.

To fully understand the concept of impact, it is essential to acknowledge that it has its foundation in the **triple bottom line (TBL) approach**. This framework broadens the definition of success to encompass social, environmental, and financial outcomes. This lesson will explore the theoretical foundations of impact, providing a comprehensive understanding of its relevance in today's economic landscape.

The Concept of Impact: Beyond Financial Metrics

Impact, in its broadest sense, refers to the **measurable and intentional positive change** that an organization, project, or initiative creates in society or the environment. Different from traditional financial metrics, impact emphasises the broader effects of an organisation's activities on people and the planet. This shift reflects a growing recognition that economic success cannot be sustained without addressing social and environmental challenges.

The concept of impact is inherently multidimensional. It encompasses **social impact**, which involves improving the well-being of individuals and communities through initiatives such as poverty reduction, education, and access to healthcare. It also considers **environmental impact**, focusing on protecting and restoring natural ecosystems by reducing carbon emissions, conserving biodiversity, and promoting sustainable resource use. Ultimately, impact encompasses **economic benefits**, which involve creating financial value in ways

that positively impact society, such as generating employment opportunities, supporting local economies, and fostering innovation. By integrating these dimensions, the concept of impact provides a holistic framework for evaluating the true value of economic activities.

The Theoretical Foundations of the notion of Societal Impact: the Triple-Bottom-Line Perspective

The **triple-bottom-line (TBL) perspective**, first introduced by John Elkington in the 1990s, is a theoretical framework that challenges the traditional notion of business success by incorporating three dimensions: **people, planet, and profit**. This framework posits that organizations should be accountable not only for their financial performance but also for their social and environmental contributions. The TBL perspective is rooted in the idea that long-term economic sustainability depends on the well-being of society and the health of the planet.

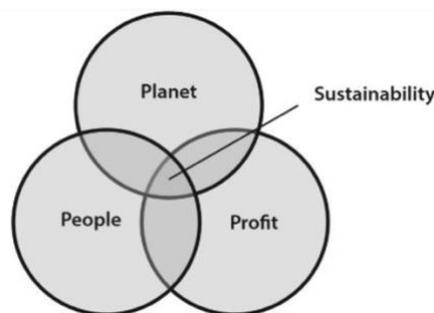


Figure 1: Triple-bottom-line

What Is the Triple Bottom Line? | Business: Explained

https://www.youtube.com/watch?v=1-Ct_53XKYY

The TBL perspective is grounded in several theoretical frameworks that challenge the traditional separation of economic, social, and environmental domains. One of the key theoretical foundations is **stakeholder theory**, which argues that organizations have a responsibility to consider the interests of all stakeholders, including employees, customers, communities, and the environment, rather than focusing solely on shareholders. This theory aligns with the TBL perspective by emphasizing the interconnectedness of social, environmental, and financial outcomes.

Another important theoretical foundation is **sustainable development**, a concept popularized by the Brundtland Commission in the 1980s. Sustainable development emphasizes the need to **meet the needs of the present without compromising the ability**

of future generations to meet their own needs. The TBL perspective operationalizes this concept by providing a practical framework for balancing economic growth with social equity and environmental protection. Additionally, the TBL perspective draws on **systems thinking**, which views organizations as part of larger social and ecological systems. This approach highlights the importance of considering the broader impacts of organizational activities and the interdependencies between economic, social, and environmental systems.

Defining Social Impact

In the social sciences, the term "*impact*" refers to the long-term effects generated by various types of interventions. Particularly, impact usually concerns a long-term perspective and a broad focus on macro contexts as a unit of analysis, and is adjusted for what would have happened anyway, the actions of others, and unintended consequences.

Definitions of Impact in Social Sciences

By impact we mean the portion of the total outcome that happened as a result of the activity of the venture, above and beyond what would have happened anyway. (Clark et al., 2004)

Impact [...] is the fruit of total outcomes minus external effects unconnected with the action, which would have occurred regardless of intervention. (Rossi et al., 2004)

The portion of the total outcome achieved due to an organization's activities, above and beyond what would have happened anyway. (Grieco et al., 2015)

From this perspective, the concept of impact can refer to economic, social and environmental dimensions, consistent with the triple bottom line perspective by Elkington (1998, 2013). Moving from this neutral definition of impact to the dimension of "social impact" helps to identify a more specific identity and boundary for this concept.

*Social impact refers to **intended and unintended** beneficial effects or **changes** (in terms of knowledge, skills, status, habits, living conditions, values...) that are likely to be enjoyed by the intended targets of the organisation's activities and/or by the **broader community** in the **long term**.*

It is possible to identify three key characteristics of organisations generating social impact:

- **Intentionality:** the social impact pursued by the organization aims at explicitly generating positive change in the behaviors or actions of the

beneficiaries directly involved in the intervention and in the community (Earl, Carden, and Smutylo, 2001; Niggemann and Bragger, 2011; Chiappini, 2017; Alijania and Karyotisb, 2018).

- **Measurability:** this dimension refers to the organisation's capacity and need to account for its activities in quantitative and qualitative terms. Social impact has to be *measurable and measured* in a quantitatively and/or qualitatively way.
- **Additionality:** this dimension entails that social impact generates a positive change in fields where market mechanisms fail or only partially work. It refers to whether the intended impact would have occurred without the investment or the intervention.

The need for accountability on the Triple Bottom line framework

Accountability is a key component of the TBL framework. A critical aspect of the TBL perspective is the development and use of metrics to measure social, environmental, and financial performance. Unlike traditional financial metrics, which are well-established and standardized, measuring social and environmental impact requires the development of new indicators and methodologies. These metrics must capture the complexity and diversity of impact, taking into account both quantitative and qualitative data.

The development of these metrics is an ongoing process, requiring collaboration between organizations, researchers, and policymakers to ensure their relevance and accuracy.

Organizations that adopt the TBL perspective must be transparent about their goals, progress, and challenges. This requires regular reporting and communication with stakeholders, as well as a commitment to continuous improvement. By holding themselves accountable, organizations can build trust and credibility, which are essential for long-term success in the impact economy.

Conclusion

The notion of impact, underpinned by the Triple Bottom Line approach, includes the broader effects of an organisation's activities on people and the planet. However, societal impact is generated only when the organization creates a long-lasting change in the wellbeing, behaviour, habits, market or institutional dynamics of a community.

After attending this lesson, you can think about how the concept of intentionality, measurability and additionality apply to your organizations' activities.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Impact Economy Foundation. *Reconstructing the economy the 21st century*.
<https://impacteconomyfoundation.org/wp-content/uploads/2020/08/Vision-Impact-Economy-Foundation.pdf>
2. Nica, I., Chiriță, N., & Georgescu, I. (2025). *Triple Bottom Line in Sustainable Development: A Comprehensive Bibliometric Analysis*. *Sustainability*, 17(5), 1932.
<https://doi.org/10.3390/su17051932>
3. The Triple Bottom Line in Practice: Case studies and examples by the World Business Council for Sustainable Development (WBCSD).
<https://www.wbcsd.org/tools-and-materials/>
4. Serafeim, George, ESG: From Process to Product (May 18, 2023). Harvard Business School Accounting & Management Unit Working Paper No. 23-069. Available at SSRN:
<https://ssrn.com/abstract=4460631> or <http://dx.doi.org/10.2139/ssrn.4460631>

Verification of the participant's understanding

Format: **Practical Exercise**

Please describe in a maximum of 500 characters the societal impact generated by your organisation.

Lesson 11

Creating Shared Value

Expected reading time: 8 minutes

Main page content

In the previous lesson, we explored the **triple-bottom-line (TBL) perspective**, which emphasizes the importance of balancing social, environmental, and financial outcomes. Building on this foundation, this lesson introduces the concept of **creating shared value (CSV)**. This strategic framework goes beyond traditional corporate social responsibility (CSR) by integrating social and environmental goals into the **core business strategy**. Unlike CSR, which often treats societal impact as a separate or secondary objective, shared value seeks to align business success with societal progress, creating economic value in ways that also address social and environmental challenges.

This lesson will delve into the theoretical underpinnings of shared value, its distinction from CSR, and how organizations can operationalize this approach to drive both business success and positive impact.

The Concept of Shared Value: A Strategic Approach to Impact

In 2011, *Michael Porter* and *Mark Kramer* introduced the concept of shared value in a seminal article in the *Harvard Business Review*. They defined shared value as policies and practices that enhance a company's competitiveness while simultaneously advancing the economic and social conditions in the communities in which it operates. Shared value is not about redistributing value (e.g., through philanthropy) but about creating new value by addressing societal needs through business innovation.

At its core, shared value challenges the traditional trade-off between business success and social progress. Instead of viewing social and environmental issues as externalities or constraints, shared value sees them as opportunities for innovation and growth. For example, a company that develops energy-efficient products not only reduces its environmental footprint but also taps into a growing market of environmentally conscious consumers. Similarly, a business that invests in employee training and development can improve productivity while addressing skills gaps in the workforce.

Shared Value vs. Corporate Social Responsibility (CSR)

Michael Porter explains the difference between shared value and CSR

<https://youtu.be/Gz1D-xzPcGo?si=IXMbxullFG7Ab5tm>

While both shared value and CSR aim to address social and environmental issues, they differ fundamentally in their approach and objectives. CSR typically involves initiatives that are separate from a company's core business operations, such as charitable donations, volunteer programs, or sustainability reporting. These initiatives are often seen as a way to "give back" to society or mitigate negative impacts, but they are not integrated into the company's strategy or value creation process.

In contrast, shared value is about **embedding social and environmental goals into the core business strategy**. It is not an add-on or a side project but a fundamental rethinking of how businesses create value. For example, a food company that sources ingredients from smallholder farmers in developing countries can improve the livelihoods of those farmers while securing a stable and sustainable supply chain. This approach creates value for both the company and the community, aligning business success with social progress.

Operationalizing Shared Value: Strategies and Frameworks

Creating shared value requires a strategic approach that integrates social and environmental considerations into every aspect of the business. Here are three key strategies for operationalizing shared value:

1. **Reconceiving Products and Markets:** Companies can create shared value by developing products and services that address unmet social or environmental needs. For example, a pharmaceutical company might develop affordable medicines for low-income populations, thereby expanding its market while improving public health. Similarly, a technology company might create educational software that enhances learning outcomes for underserved students, tapping into a growing demand for digital education solutions.
2. **Redefining Productivity in the Value Chain:** Companies can create shared value by improving the efficiency and sustainability of their value chains. This might involve reducing waste, conserving resources, or improving working conditions for employees and suppliers. For example, a clothing manufacturer that adopts sustainable production practices can reduce its environmental impact while lowering costs and enhancing its brand reputation.
3. **Enabling Local Cluster Development:** Companies can create shared value by investing in the communities where they operate, thereby strengthening the local economy and creating a more favorable business environment. This might involve supporting local education and training programs, improving infrastructure, or

fostering entrepreneurship. For example, a multinational corporation that invests in vocational training programs in its host communities can develop a skilled workforce while reducing recruitment and training costs.

Examples of creating shared value

- **Unilever:** Unilever’s Sustainable Living Plan aims to decouple its growth from its environmental footprint while increasing its positive social impact. For example, the Lifebuoy soap brand launched a handwashing campaign in rural India, helping to combat diseases and improve health outcomes. This, in turn, increased demand for their products.
- **Novo Nordisk:** Novo Nordisk, a global healthcare company, has developed a “Blueprint for Change Program” to improve diabetes care within communities. The program targets issues such as early diagnosis and access to care, resulting in better societal health outcomes and an increased market for their products.
- **Danone:** Around the 2000s, Danone began to explicitly integrate social goals into its business strategy, inspired by the concept of Creating Shared Value (CSV). Its guiding principle became: “One Planet. One Health.” This reflects the idea that the health of people and the health of the planet are interdependent — and that addressing social and environmental challenges can also drive business success. Danone and Grameen created a joint venture (2006) to produce and distribute a fortified yogurt called Shokti Doi (“Energy Yogurt”) to solve the children malnutrition in Bangladesh.

Conclusion

Creating shared value represents a paradigm shift in how businesses approach social and environmental challenges. As the impact economy continues to evolve, shared value offers a powerful framework for aligning business success with societal progress, creating value for both shareholders and stakeholders. Once you have completed this lesson, consider how your organization can support corporates to adopt a shared value approach

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Michael Porter and Mark Kramer. 2011. Creating Shared Value. *Harvard Business Review* <https://hbr.org/2011/01/the-big-idea-creating-shared-value>
2. Menghwar, Prem & Daood, Antonio. (2021). Creating shared value: A systematic review, synthesis and integrative perspective. *International Journal of Management Reviews*. 23. 10.1111/ijmr.12252.
3. Marc W. Pfitzer, Valerie Bockstette and Mike Stamp. 2013. Innovating for Shared Value. *Harvard Business Review*. <https://hbr.org/2013/09/innovating-for-shared-value>

Verification of the participant's understanding

Format: **Practical Exercise**

Please provide an example of a company working in the same field as your organisation, which can be considered a successful case in creating shared value.

Lesson 12

Sustainable & Impact finance

Expected reading time: 8 minutes

Main page content

The integration of social and environmental concerns into the business sector’s practices also involves an evolution of financial institutions to support organisations and projects that generate positive social and environmental outcomes alongside financial returns. Two key approaches that have emerged in this space are **sustainable finance** and **impact investing**. While these terms are often used interchangeably, they represent distinct approaches to aligning financial systems with the goals of the impact economy. This lesson will explore the definitions, principles, and applications of sustainable finance and impact investing, providing a comprehensive understanding of their roles in driving positive change.

What is Impact Finance?



Figure 1: The spectrum of sustainability-oriented finance. Source: Bridges Impact + and the Impact Management Project

One of the main changes we have witnessed in recent years is the increasing penetration of moral and ethical considerations into financial mechanisms, and thus a growing attention to environmental, social, and governance (ESG) aspects. However, the integration of ESG

into asset allocation decisions may take different approaches based on the level of proactiveness and intentionality in fostering novel solutions to societal challenges. Historically, investors have begun to exclude specific harmful sectors from their portfolios (negative screening approach). They then moved to consider ESG issues in investment analysis to protect a portfolio from operational or reputational risks, thereby reducing risk and generating better returns. ESG investing considers a broader set of metrics to measure a company's risks, which also assess how environmental, social and governance risk factors affect its performance, both positively and negatively.

A more proactive approach to considering ESG aspects emerged with the practice of **Sustainable finance**, which refers to investments in sectors, companies, or projects with a positive ESG performance compared to sector peers. The goal of sustainable finance is to promote long-term value creation by considering the broader impacts of investments on society and the environment. While sustainable finance does not necessarily require investments to have an explicit social or environmental mission, it encourages investors to incorporate ESG factors into their risk assessments and investment strategies.

Sustainable finance encompasses a wide range of financial instruments and practices, including **green bonds**, **social bonds**, and **ESG-focused funds**. These instruments are designed to channel capital toward projects and companies that demonstrate strong positive ESG performance. For example, green bonds are used to finance renewable energy projects, energy-efficient buildings, and other environmentally beneficial initiatives. Similarly, social bonds are used to fund projects that address social issues, such as affordable housing, healthcare, and education.

For about 15 years, the term "**Impact Finance**" (or "Impact Investing") has been introduced to represent a specific breed of investors actively seeking out opportunities to address pressing global challenges, such as poverty, climate change, and inequality, while achieving competitive financial returns. Therefore, they focus on financial investments with the **explicit intention of generating both measurable social and environmental impact** alongside financial returns.

While both sustainable and impact finance aim to align financial systems with social and environmental goals, they differ in their focus and approach:

1. **Intentionality:** Impact finance is characterized by its explicit intention to generate positive social and environmental impact, whereas sustainable finance focuses on

integrating ESG criteria into financial decision-making without necessarily prioritizing impact over financial returns.

2. **Measurement:** Impact finance places a strong emphasis on measuring and reporting social and environmental outcomes, often using standardized metrics and frameworks. Sustainable finance, while also concerned with ESG performance, may place greater emphasis on financial risk and return considerations.
3. **Scope:** Impact finance is typically associated with specific investments or projects that have a clear social or environmental mission. Sustainable finance, on the other hand, encompasses a broader range of financial activities, including the integration of ESG criteria into mainstream investment practices.

Equity-based	Debt-based	Public-Private Partnership for impact
Social impact fund Venture philanthropy	Social impact loan	Payment by results Social Impact Bonds Outcome fund

Figure 2: Types of impact finance

How *impact finance* can support the SEOs

Impact finance is not intended to substitute other financial sources such as traditional philanthropy or public funding that have historically supported SEO’s initiatives, but to complement them. Impact finance, thus, operates in those areas or sectors that are not considered in charge of the public sector, or the public sector has not enough funding to intervene; or in those undercapitalized areas because they are not attractive for traditional investors.

1. **Driving Innovation:** Impact finance and sustainable finance encourage innovation by providing funding for new technologies, business models, and solutions that address global challenges. For example, impact investors have played a key role in scaling renewable energy technologies, while sustainable finance has supported the development of green infrastructure and sustainable supply chains.
2. **Promoting Accountability:** By emphasizing the measurement and reporting of social and environmental outcomes, impact finance and sustainable finance promote greater transparency and accountability in financial systems. This helps ensure that capital is being used effectively to create positive impact.
3. **Scaling Solutions:** Impact finance and sustainable finance provide the capital needed to scale solutions to global challenges. For example, impact investors have

supported the growth of microfinance institutions that provide financial services to low-income individuals. At the same time, sustainable finance has facilitated the expansion of renewable energy projects worldwide.

Impact investors held the promise of a source of funding able to value the specificities of socially oriented organisations by assessing their impact generation primarily over financials. So, which are the most common criteria used by impact investors in screening and evaluating potential investees?

First, impact investors often filter out opportunities lacking a credible impact logic, namely when the impact objectives are too vague or unmeasurable, even if the financial metrics appear strong. Impact investors tend to prioritize ventures tackling more **important or urgent social challenges** (e.g. underserved populations, climate, health, education) rather than incremental improvements in “low priority” areas. The Block et al. experiment shows that “importance of the societal problem targeted” is a top screening attribute.

They are also more concerned about mission drift (the risk that the investee will shift away from its social mission under financial pressure) and impact washing (claims of impact without substance). For screening, this means greater scrutiny of governance, incentives, accountability mechanisms, and the alignment of stakeholder incentives to ensure the investee remains mission-aligned over time.

The study by Block, Hirschmann & Fisch (2021) finds that among impact investors, **the authenticity of the founding team** is one of the top criteria in screening, alongside the importance of the societal problem targeted and financial sustainability. “Authenticity” here refers to whether the founders demonstrate a genuine commitment to the social mission (e.g. prior track record, reputation, values) rather than only opportunistic or superficial alignment. Since impact investors care about both social and financial outcomes, they often demand more sophisticated governance mechanisms to align incentives: e.g. performance-based clauses tied to impact metrics, board seats or advisory oversight for impact, restrictions on mission drift, “clawbacks,” or exit constraints tied to impact outcomes.

Third, they also look closely at **scalability** or potential for replicability / leverage — i.e. can the social impact grow beyond a pilot or niche context. Some impact investors prefer ventures with high growth potential in social reach, not just revenue.

Impact investors prioritise **monitoring, measurement, and verification** of social outcomes over time. They often require regular impact reporting and use of agreed metrics;

moreover, they carefully assess **attribution** (how much of the outcome is due to the investee’s efforts vs external factors) and **additionality** in evaluation.

Reference Initiative and Networks on Impact Investing

Global Impact Investing Network (GIIN) - <https://thegiin.org/>

The GIIN is a nonprofit membership organization that aims to increase the scale and effectiveness of impact investing globally. It acts as a convenor, knowledge hub, and infrastructure builder for the impact investing field.

Impact Europe - <https://www.impacteurope.net/>

The network, ” bringing together capital providers (foundations, impact funds, banks, public funders, corporate impact arms) across Europe (and beyond) to mobilize capital and support the development of impact markets.

GSG Impact - <https://www.gsgimpact.org/>

GSG Impact (formerly the Global Steering Group for Impact Investment) is a global network that seeks to catalyze changes in financial systems so that every investment—public, private, or philanthropic—can contribute to positive social and environmental outcomes.

Impact frontiers - <https://impactfrontiers.org/>

Impact Frontiers is a collaborative, market-building and learning initiative that helps investors integrate social and environmental impact into investment decision-making.

Conclusion

This lesson has described the distinctive feature of impact finance, a financial approach that promises to support organisations generating positive benefits for society and the planet. We have considered how it differs from ESG investing to proactively foster the development of the investees and the scalability of effective solutions. After having understood which criteria impact investors consider when selecting investment opportunities, you can pretend to pitch your SEO to an impact investor: which strengths would you emphasise and which elements should be further developed to increase the fundraising capacity?

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Sustainable Finance in the EU: A guide by the European Commission on sustainable finance initiatives and regulations. https://finance.ec.europa.eu/sustainable-finance/overview-sustainable-finance/platform-sustainable-finance_en
2. Borrello, A., Bengo, I., & Moran, M. (2024). How impact investing funds invest in social-purpose organizations: A cross-country comparison. *Corporate Social Responsibility and Environmental Management*, 31(2), 879–894. <https://doi.org/10.1002/csr.2605>
3. Systemic impact investing standard - <https://www.systemicimpactinvestingstandard.org>
4. Block, Joern H. & Hirschmann, Mirko & Fisch, Christian, 2021. Which criteria matter when impact investors screen social enterprises?, *Journal of Corporate Finance*, Elsevier, vol. 66(C).



Verification of the participant’s understanding

Format: Practical exercise

Please provide at least two examples of organisations performing sustainable or impact finance in your country, briefly describing their approach.

Format: Scenario analysis

Please explain whether each of the following scenarios can be categorised as impact finance and why.

Scenario	Yes/No; Why
There is an opportunity to donate funds to a local charity that supports affordable housing projects.	
There is a local developer seeking private loans with interest rates that are lower than the US Treasury rate, to defer some of their construction costs.	
That same developer offers an opportunity for you to invest in a limited partnership, the proceeds of which will support the construction of affordable housing. It is expected to generate market (or better) returns.	

Lesson 13

Configurations of Public Private Partnership for Social Impact

Expected reading time: 8 minutes

Main page content

In an era of increasingly complex social challenges (ranging from climate change and inequality to healthcare access and education gaps), governments, businesses, and civil society organisations are recognising the limitations of working in isolation. No single sector has all the resources, expertise, or capacity to address these issues effectively.

This realization has led to the rise of **public-private partnerships (PPPs)**: collaborative arrangements that bring together the strengths of the public sector, private sector, and civil society to achieve shared goals that benefit society as a whole.

This lesson will explore the **configuration of PPPs for social impact**, focusing on what PPPs are, how they work, and why they are effective in addressing social challenges. By the end of this lesson, you will understand how PPPs can be structured to maximize their social impact while ensuring accountability, transparency, and sustainability.

What Are Public-Private Partnerships (PPPs)?

Public-private partnerships (PPPs) are collaborative arrangements between public sector entities (such as governments or municipalities) and private sector organizations (such as businesses, non-profits, or social enterprises) to deliver public services, infrastructure projects, or initiatives that address social challenges. Unlike traditional procurement models, where the public sector contracts the private sector to deliver a specific service, PPPs involve a deeper level of collaboration, with shared responsibilities, risks, and rewards.

PPPs are not a one-size-fits-all solution; they can take many forms depending on the context and the goals of the partnership. However, they all share a common feature: the **combination of public sector resources** (such as funding, regulatory support, and

oversight) with **private sector expertise** (such as innovation, efficiency, and technical skills). **Civil society** organizations often play a critical role in ensuring that the needs of communities are addressed and that the partnership remains accountable to its social mission.

Key Elements of Successful PPPs for Social Impact

To maximize their social impact, PPPs must be carefully configured to ensure that they are effective, sustainable, and aligned with the needs of the communities they serve. Here are the key elements of successful PPPs for social impact:

1. **Clear Objectives and Shared Vision:** Successful PPPs begin with a clear definition of the social impact goals and a shared vision among all partners. This involves identifying the specific social challenges to be addressed, the desired outcomes, and the roles and responsibilities of each partner.
2. **Stakeholder Engagement and Inclusivity:** PPPs for social impact must involve all relevant stakeholders, including the communities that will benefit from the partnership. This ensures that the solutions developed are relevant, equitable, and sustainable.
3. **Risk Sharing and Accountability:** One of the defining features of PPPs is the sharing of risks and rewards between the public and private sectors. In the context of social impact, this means that both partners must be accountable for achieving the desired outcomes.
4. **Innovation and Flexibility:** PPPs for social impact often require innovative approaches to address complex challenges. This might involve developing new technologies, business models, or service delivery methods.
5. **Sustainability and Long-Term Impact:** To ensure that PPPs create lasting social impact, they must be designed with sustainability in mind. This includes financial sustainability, such as securing long-term funding sources, as well as environmental and social sustainability.
For example, the Rajasthan Solar Power Project includes plans for maintaining and operating the solar plants over the long term, ensuring that the benefits are enduring.

Real-World Examples of PPPs for Social Impact



The Gavi Alliance is a global health partnership dedicated to increasing access to life-saving vaccines for children in the world's poorest countries. The partnership successfully brings together governments (who commit to using the vaccines), pharmaceutical companies (the private sector who supply them), and powerful foundations/NGOs (like the Bill & Melinda Gates Foundation, who provide large-scale, predictable funding).

The core of the PPP's success lies in its sophisticated dialogue with pharmaceutical companies. Instead of engaging in a simple standoff where Gavi demanded low prices and Pharma demanded profits, they achieved a Mutual Gain: Gavi guaranteed a massive, stable demand pipeline over many years. This guarantee allowed Pharma to dramatically reduce the price per unit while still ensuring long-term profitability and predictable revenue.

This innovative financial configuration, fueled by effective dialogue, has resulted in the immunization of over 888 million children, preventing more than 15 million deaths, proving the power of combined purchasing and supply strategy for global health.

Challenges and Risks in PPPs for Social Impact

While PPPs are powerful vehicles for change, their inherent complexity introduces significant challenges that can undermine their social mission if not proactively addressed. The fundamental tension often lies in misaligned incentives. Private companies are naturally driven by profit and shareholder value, while public sector partners are mandated to prioritize social outcomes, equity, and public service. This disparity requires clear and robust governance.

One key challenge is the complexity of coordination and governance. PPPs often involve multiple stakeholders with different reporting requirements, decision-making processes, and timelines. This complexity can lead to slow decision-making and project delays. For instance, differing risk tolerance—where the public sector might accept slower progress to ensure maximum community input, while the private partner demands faster execution to

meet financial projections—must be managed through a transparent, mutually agreed-upon governance structure that dictates how conflicts are resolved.

Furthermore, sustainability and exit strategies are often overlooked during the initial configuration. Many PPPs are grant-funded or dependent on the political will of a single administration. Suppose a partnership is not designed from the outset with a clear plan for financial independence or a smooth transition of responsibility (e.g., handing over operation to a local entity) once the initial term is complete. In that case, the social impact created may be short-lived. To ensure lasting benefit, the partnership must be configured to build local capacity and secure long-term resources, making the social return on investment the central metric of success, not just the financial return.

Conclusion

Effective PPPs require more than a contract; they demand a common understanding and genuine dialogue among partners whose organizational goals (incentives) may differ. Some of the practical tools presented in the different modules included in this course might be helpful to bring stakeholders to the same table, identify their distinct perspectives, and foster productive dialogue:

- **Stakeholder Mapping and Power-Interest Grid** [Please include the link to the respective lecture Lesson_1.2.4.Stakeholder Engagement]
- **Theory of Change (ToC) Workshops** [Please include the link to the respective lecture Lesson_1.5.1.Theory of change]

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. **Case Studies in PPPs for Social Impact:** A collection of case studies by the PPP Knowledge Lab on successful PPPs for social impact.
<https://pppknowledgelab.org/>
2. The World Bank Group. **PPP Toolkits.**
<https://ppp.worldbank.org/selected-world-bank-tools>

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is a key characteristic of public-private partnerships (PPPs)?

- A. They are only used for infrastructure projects
- B. They involve shared responsibilities, risks, and rewards between public and private sectors**
- C. They are funded entirely by the private sector
- D. They exclude civil society organizations

Question 2

Which of the following is an example of a PPP for social impact?

- A. A government building a highway without private sector involvement
- B. A partnership between a government, a private company, and a non-profit to improve access to clean water**
- C. A private company launching a new product without government support
- D. A non-profit organization running a fundraising campaign

Question 3

What is a common challenge in PPPs for social impact?

- A. Misaligned incentives between public and private partners**
- B. Lack of interest from the private sector
- C. Over-reliance on government funding
- D. Inability to measure financial performance

Lesson 14

Communicate and report your impact

Expected reading time: 8 minutes

Main page content

In today's socially conscious world, consumers, investors, and stakeholders are increasingly demanding that organizations demonstrate their commitment to creating positive social and environmental impact. For Social Economy Organizations (SEOs), effectively communicating their mission and impact is not just a moral obligation: it is a **strategic tool** for **building trust, attracting funding, and differentiating themselves in a competitive market**. Marketing and communication of social impact have become essential components of an organization's strategy, enabling SEOs to connect with their audiences, amplify their mission, and drive meaningful change.

However, communicating social impact is not without its challenges. Organizations must navigate the risks of **impact washing, misrepresentation, and overpromising**, which can damage their credibility and undermine their mission. At the same time, they must ensure that credible data and transparent reporting on their impact communication.

This lesson will explore why SEOs leverage social impact as a strategic communication tool, the risks associated with impact communication, and the role of **impact reports** in providing transparency and accountability.

Why Social Impact is a Strategic Communication Tool

Social impact lies at the heart of SEOs' missions, not just as an outcome but as a driving purpose. Communicating this impact fosters trust and credibility by demonstrating transparency and accountability in a skeptical era. It also helps attract funding, as investors and donors increasingly seek organizations with measurable social and environmental contributions. In competitive markets, clear communication of impact allows SEOs to stand out by appealing to consumers who prefer value-aligned brands. For employees and volunteers, understanding the tangible outcomes of their work enhances motivation, purpose, and retention. Additionally, communicating impact strengthens advocacy by raising awareness of systemic issues like climate change or

inequality. Ultimately, effective impact communication serves as a strategic tool that advances both organizational sustainability and broader societal change.

How to develop an Impact Report

An **impact report** is a document that provides a comprehensive overview of an organization’s social and environmental impact.

Build Impact Reports That Inspire in 5 Minutes by Sopact

<https://youtu.be/u6Wdy2NMKGU> (07:06 min)

What To Include?

Impact reports typically include the following elements:

- **The Unmet Need:** explaining the unmet need will help to make clear the urgency and importance of your work. This may be a major issue for society, have recently become much worse and/or likely to become much worse and existing services may not be able to respond.
- **Purpose and objectives:** The report should clearly articulate the organization’s mission, and goals, as well as how its activities contribute to social and environmental impact.
- **Impact Metrics:** The report should include quantitative and qualitative data that demonstrate the organization’s impact. This might include metrics such as the number of people served, the percentage improvement in a specific outcome, or the amount of carbon emissions reduced. The report should explain the methodologies and frameworks used to measure and report impact. **More information about how to measure your societal impact will be addressed in the next module.**
- **Case Studies and Stories:** Impact reports often include case studies or stories that illustrate the real-world effects of the organization’s work. These stories help humanize the data and make the impact more relatable.
- **Challenges and Lessons Learned:** An effective impact report should also be transparent about the challenges the organization has faced, and the lessons learned. This demonstrates accountability and a commitment to continuous improvement.
- **Future Goals and Commitments:** Finally, the report should outline the organization’s future goals and commitments, showing how it plans to build on its impact and address ongoing challenges.

How to do it

Here you find impact report template through **Canva**:

<https://www.canva.com/reports/templates/charity/>

Risks of Communicating Impact

While communicating social impact is essential, it comes with significant risks that organizations must navigate carefully. These risks include:

1. **Greenwashing:** Greenwashing occurs when an organization exaggerates or misrepresents its environmental impact to appear more sustainable than it is. This can lead to a loss of trust and credibility among stakeholders. To avoid greenwashing, organizations must ensure that their claims are backed by credible data and third-party verification.
2. **Misrepresentation of impact:** Another risk is the misrepresentation of impact, where organizations overstate their achievements or fail to provide context for their results. For example, an organization might claim to have "transformed the lives of thousands" without specifying how or providing evidence of long-term outcomes. This can lead to skepticism and criticism from stakeholders. To mitigate this risk, organizations should be transparent about their methodologies, limitations, and challenges.
3. **Overpromising:** SEOs may feel pressure to overpromise on their impact to attract funding or support. However, failing to deliver on these promises can damage an organization's reputation and relationships with stakeholders.
4. **Lack of Standardization:** The lack of standardized metrics and reporting frameworks for social impact can make it difficult for organizations to communicate their impact consistently and credibly. This can lead to confusion among stakeholders and make it harder to compare the impact of different organizations. To address this challenge, many SEOs are adopting frameworks such as the **Global Reporting Initiative (GRI)** or the **Impact Management Project (IMP)** to standardize their impact measurement and reporting.

Conclusion

For SEOs, communicating social impact is a **strategic tool** for building trust, attracting funding, and driving advocacy. However, it also comes with risks, such as greenwashing, misrepresentation, and overpromising, which can damage an organisation's credibility. To mitigate these risks, SEOs must ensure that their impact communication is transparent, credible, and backed by data. Impact reports play a critical role in this process, providing a comprehensive and transparent overview of an organisation's social and environmental impact. After completing the lesson, you can envision the immediate next steps you should undertake to leverage your organisation's impact results to engage with specific stakeholders.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Sopact. *AI-Powered Impact Reporting: From Clean Data Collection to Instant Insight*. <https://www.sopact.com/use-case/impact-reporting>
2. Sopact. *Best Impact Reports and Dashboard*. <https://www.sopact.com/reports>



Verification of the participant's understanding

Format: Practical exercise

Please write the “Impact Highlight” of your organisation. Impact highlights should be one or two sentences describing the main results the SEO has achieved in the last year; please include two **quantitative indicators** (e.g., “Supported 120 local farmers”) and two **qualitative insights or stories** (e.g., “Maria, one of our trainees, started her own business after the program”).

Social impact assessment tools

The module includes the following lessons:

15. Theory of change

16. Impact modelling and frameworks

17. Social Return on Investment

18. Strategies and tools for data gathering

Lesson 15

Theory of change

Expected reading time: 7 minutes

Main page content

In recent years, the concept of social impact has gained increasing attention as organizations—particularly those operating in the social economy and hybrid business models—seek to measure and demonstrate the value generated by their activities beyond traditional financial metrics. This has led to the development of various methodologies and tools aimed at quantifying and evaluating non-economic changes brought about by interventions, giving rise to the discipline of **Social Impact Assessment (SIA)**.

Impact Cycle Management (ICM) is the management approach that lays on the foundation of what has been described above. It represents a continuous cycle that encompasses several key stages. The process begins with the prediction of expected impacts, where the anticipated social and environmental outcomes of a project are estimated. This is followed by a collaborative design phase, during which stakeholders are actively engaged to ensure alignment with shared goals and priorities.



Figure 1: Managing Impact. Source: EVPA.

Throughout the implementation of the project, indicators are monitored, allowing for the identification of deviations and the implementation of necessary adjustments to optimize outcomes. At the conclusion of the intervention, the net social and environmental impacts are rigorously evaluated to determine the effectiveness and overall value generated. The final step involves communicating the results to relevant audiences, ensuring transparency and fostering accountability.

ICM provides organisations with a structured framework for informed decision-making, enabling them to maximise positive impacts while proactively mitigating potential negative effects. This cyclical approach underscores the importance of flexibility, continuous learning, and stakeholder engagement in achieving sustainable and meaningful change.

The methodology that will be described in the following unit take **Theory of Change (ToC) as a preliminary milestone of the SIA project.**

What is the Theory of Change (ToC)

Theories of Change originated in the field of program theory and evaluation during the mid-1990s as an innovative approach to understanding the underlying theories driving social and political initiatives. The concept builds on Peter Drucker's earlier framework of Management by Objectives, introduced in his 1954 book *The Practice of Management*. This approach involves defining **higher-order goals and the lower-order objectives expected to lead to their achievement**. Theories of Change (ToC) take this framework further by including the concept of impact, which represents the **broader outcomes** anticipated from achieving these goals.

The Theory of Change (ToC) is a strategic framework used to design projects, services, programs, and policies that synthetically outline **how and why a desired change is expected to occur in a particular context**. It provides a roadmap that links inputs, activities, and outputs to intermediate outcomes and ultimate goals, illustrating the **causal pathways of change**. Central to ToC is the identification of assumptions underlying each step, which helps clarify, what is needed to achieve intended results. By systematically mapping these relationships, ToC supports planning, monitoring, and evaluation processes. It is often used in social, environmental, and development projects to ensure **alignment between activities and long-term objectives**, while also **engaging stakeholders in a shared understanding of the change process**.

How to use the Theory of Change (ToC)

ToC is a practical approach that can be applied in the creation of projects, services, programs and policies that foster co-design and long-term thinking, by encouraging stakeholders to discuss about the critical elements of their initiatives in a logical and

structured manner. In addition, ToC can be visualised as a **graphic map** and several visual schemes can be used. In this training the model proposed by Clark et al (2004) was selected as it is the most functional to be applied also in impact cycle management and impact assessment and monitoring.

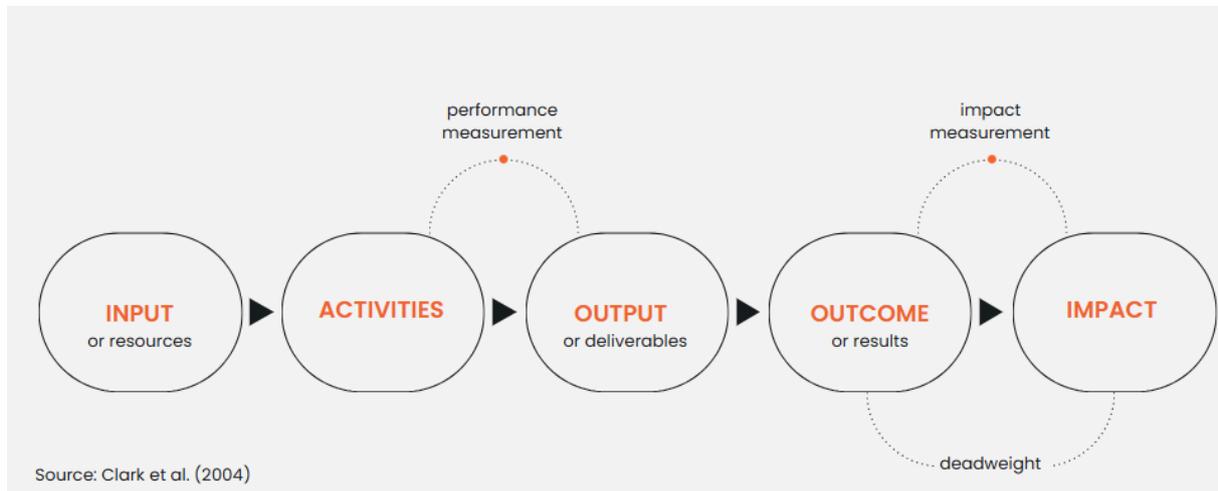


Figure 1: ToC structure. Source: Clark et al (2004).

The ToC outlines a connected pathway where inputs, such as resources and funding, enable specific activities designed to address a particular need. These activities produce outputs, such as measurable immediate results, which lead to outcomes—changes in behavior, attitudes, or skills among stakeholders. Over time, these outcomes contribute to impact, resulting in long-term systemic changes that align with the intervention’s goals. Each element builds on the previous, forming a conceptual and graphic cause-and-effect chain that transforms initial resources into lasting societal benefits.

The ToC is not only meant to be developed at the beginning of the project, but it can also be analysed throughout the project by “backpropagation” through backwards mapping. While observing if the expected outcomes have been generated or not organisation can figure out if to what extent modify the previous element (input, activities, output) to respect the impact ambition they set at the beginning. ToC together with Impact Framework and Data Gathering Strategy (that will be explained in depth in next units) is an effective preparatory tool to realise social impact monitoring and assessment, to ensure proper impact cycle management.

ToC in practice
 ToC have 5 principal elements which represents its backbone and 2 analytical dimensions which are necessary to consider while developing it. We will consider SETS project as example to develop its ToC. Here there is a brief description.

The SETS project aims to develop, test, and disseminate skills development programs and training modules to support the green and digital transition of Social Economy Organizations (SEOs).

Key elements:

- **Inputs** are the resources required to carry out activities in a project or program. These can include financial resources, human effort, time, infrastructure, technology, and materials. Inputs are the foundational elements necessary to initiate and sustain the change process.
Example: Funding, staff expertise, educational materials, learning platform
- **Activities** are the specific actions or tasks carried out using the inputs to deliver outputs. They represent the operational steps taken to implement the program or project.
Example: Conducting workshops, providing training sessions, research, dissemination event
- **Outputs** are the immediate, tangible, and measurable products or deliverables resulting directly from the activities. Outputs are typically quantifiable and represent what the activities have achieved.
Example: Number of participants trained, research distributed, or workshops held.
- **Outcomes** are the short-term or intermediate changes resulting from the outputs. They reflect the difference made in the lives of individuals, groups, or communities due to the project's activities. Outcomes are often changes in behavior, knowledge, skills, or attitudes.
Example: Improved digital skills among participants, increased awareness of a social issue.
- **Impact** represents the long-term, broader changes or transformations resulting from the outcomes. It reflects the ultimate goal of the program and is often tied to systemic or societal shifts in well-being, equity, or sustainability.
Example: to support the green and digital transition of Social Economy Organizations, up-skilling of workers, training innovation.

Analytical dimensions

- **Context analysis** provides a comprehensive understanding of the social, economic, and cultural conditions affecting the target community. By identifying local challenges, enabling factors, actual need and existing activities, it ensures the project is relevant and responsive to the local environment, minimizing risks and aligning goals with existing systems and expectations.
- **Stakeholder analysis** identifies and categorizes individuals or groups affected by or influencing a project. It promotes the understanding of the local network dynamics. His analysis helps in aligning the project's goals with stakeholders' needs, fostering collaboration, managing potential conflicts, and ensuring the initiative's relevance and sustainability.

There are many **digital tools which allow a step-by-step theory of change development**. One of the most recent, among the others, have been realise by TASO:
<https://taso.org.uk/libraryitem/theory-of-change-builder/>

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Funnell, Sue & Rogers, Patricia. (2011). *Purposeful Program Theory: Effective Use of Theories of Change and Logic Models*.
 2. Sopact. *Theory of Change vs Logic Model: Which Framework is Right for Your Project?*
<https://www.sopact.com/guides/theory-of-change-vs-logic-model>
 3. Sopact. *Theory Of Change: How to Tell a Story with Data*.
<https://www.youtube.com/watch?v=cU9EhjqSUWE&list=PLUZhQX79v60UUxrbpUXrhjxBXtpIX6lQj&index=1>
 4. *Center for Theory of change*. <https://www.theoryofchange.org/what-is-theory-of-change/toc-background/>
 5. Getting started with TASO's Theory of Change Builder.
https://www.youtube.com/watch?v=ibIHWDQ0P_I&t=314s
-

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary goal of the Theory of Change framework?

- A. To define an organization's financial goals
- B. To identify the leadership roles in a project
- C. To outline how and why a desired change is expected to happen in a specific context
- D. To prioritize marketing strategies for social programs

Question 2

In the Theory of Change, what does the term "Inputs" refer to?

- A. Long-term societal transformations resulting from the project
- B. Tangible and measurable products created by activities
- C. The resources required to carry out project activities
- D. The changes in behavior or skills resulting from the project

Question 3

What is a key analytical dimension in developing a Theory of Change?

- A. Identifying market trends
- B. Conducting context and stakeholder analysis
- C. Creating visual advertisements for projects
- D. Designing workshops to generate revenue

Lesson 16

Impact modelling and frameworks

Expected time effort: 10 min

Main page content

An **impact monitoring framework** is a structured approach used to systematically assess and document the effects and outcomes of projects or initiatives, particularly those aimed at creating social, economic, environmental, and cultural changes. This framework serves as a fundamental tool for project managers, policymakers, and stakeholders to ensure that the intended benefits of any initiative are properly forecasted, linked and monitored over time. It provides the metrics and methodology for measuring specific outcomes and offers a comprehensive view of how these outcomes align with the overall objectives of a project. The core of an impact monitoring framework lies in its ability to connect project outcomes (the resources committed to a project, previously identified through the Theory of Change) to broader outcome areas (cluster of similar outcomes) to the stakeholder (entity who/which will experiment the effect), indicators (metrics needed to quantify and measure the outcomes), broader taxonomies of impact accounting (SDGs, GRI etc..) and finally to means of verification.

To be effective, an impact monitoring framework must be clearly defined and aligned with the project's goals from the outset. It typically involves several key components:

1. Outcome definition and aggregation: clearly defining what the project aims to achieve and creating clusters of outcomes.
2. Quantify and qualify
 - 2.1) Stakeholder identification: identify key stakeholders who/which perceive or experience the effects of the activities (outcomes)
 - 2.2) Selection of indicators: identifying specific, measurable indicators that can provide evidence of progress towards achieving these goals.
3. Linkage to official impact accounting and reporting taxonomies: Outcomes must be connected to objectives, targets, and indicators of official taxonomies (SDGs, GRI, Horizon programme objectives, ESG, SASB), allowing each initiative's impact to be reported and communicated according to these frameworks.
4. Decision of means of verification (data gathering tools): tools needed to gather data related to each indicator (such as surveys, databases, interviews, focus groups, network analysis matrices, etc.)

Proprietary Video Materials

The video leverages the SETS project as a case study to exemplify how to develop an impact framework and run continuous monitoring on your organisation's impact results.

Video transcript

Outcome mapping and clustering (Slide 3-7)

Select a project or initiative with social and or environmental impact you are realizing. We will develop its impact framework step by step.

We will take as example SETS project itself. Here you have a brief description

Think about your project and start listing and mapping all the outcomes that your initiative aims to generate. As defined in the previous lesson an outcome is: *“the short to medium effects you are looking to have or the ‘step changes’, which need to occur in order to achieve your long term or ultimate goal”*.

You can create a list with your colleagues or by getting inspired by some outcomes database that are already available on the web.

The advice is to have a set of outcomes that does not exceed ten, unless your initiative is highly complex. Once you have completed this task you should have a simple list of outcomes, with probably little logical order.

Once you have visually mapped the list of expected outcomes, the next step is to provide a logical and qualitative order by clustering them in outcome areas.

Outcome areas are: *“sets containing outcomes which are akin according to specific similarity criteria”*. Substantially, as in basic set theory, you start dividing the entire set of outcomes into subsets populated by similar outcomes. The result should look like this:

At this stage you have the backbone of your impact framework, and you can start working on the following aspects, stakeholders and indicators

Quantify and qualify, stakeholder identification and outcome selections (Slide 8-11)

Outcomes are not abstract entities, but actual and measurable effects that are experimented by some specific stakeholder.

As stakeholder we define *“those entities (es: people, organization, ecosystem) who/which will benefit or be damaged from the display of a given outcome”*.

As shown in the previous lesson, every outcome can affect:

- a person (individual)
- community/group (i.e.: a local context or an organization)

- collectivity, broader system such as public policy

Now, your duty is to identify at least 1 stakeholder for every outcome of your impact framework. The result should look like this

At this stage the first part of your impact framework is almost completed; you have determined the outcomes of your initiative, associated them into areas and identified whom will experiment it.

The next step is to add a quantitative dimension that can make your impact monitorable, measurable and communicable: indicators.

Indicators are necessary to provide linkages to quali-quantitative dimensions that guarantee measurability. As you can notice, each indicator is often influenced by the stakeholder that experiments the outcome. Each outcome can have multiple indicators. After completing this task your impact framework has reached a very advanced stage.

Linkage to official impact accounting and reporting taxonomies (Slide 11-12)

Creating an impact framework for an initiative is a very useful activity *per se* as you will be provided with a strategic document that permits you to map and monitor the impact of your activity. Nonetheless, if you aim to communicate it to external context or give value to your projects by inserting them into official accounting report, you have a further task to fulfill: identify official accounting and reporting taxonomies to be inserted into your impact framework.

The taxonomies available are many (SDGs, GRI, Horizon programme objectives, ESG, SASB) and you should select some according to your specific interest. What they have in common are subsets of objectives, targets, goals and so on.

As you did for your own initiative, you have now to select specific dimensions of a taxonomy and link them to your outcome areas or outcome.

The impact framework is almost completed. It has an internal logical and qualitative order, it has indicators that ensure quantification, and it is linked to official external taxonomy to be communicable to the outer context. The final step is to ensure that data about our outcomes are collected, by choosing the means of verification.

Decision of means of verification (data gathering tools) (Slide 13-14)

In section 3 we underlined that indicators were needed to make an outcome quantifiable and measurable. Nonetheless, there is no measurability without data gathering, and there is no data gathering without means of verification (data gathering tools). A means of verification is “*the source of information that needs to be collected to qualify and/or quantify the defined indicators. It has to be taken in consideration how information will be collected, who will be responsible and how often the information should be provided*”.

Means of verification can be many and they vary according to each outcome and stakeholder. Here you have some examples:

At this stage you can consider your work done, your impact framework is completed!

In lesson 1.5.4 you will see how to create a “ad hoc” data gathering strategy for your project and create an operational plan to use the means of verification you have listed.

Conclusion (Slide 15)

The impact framework methodology is designed to assess and document the effects of projects, particularly for social, economic, environmental, and cultural impact. It helps project managers, policymakers, and stakeholders align and track project benefits over time.

Its core elements are:

1. **Outcome Definition and Aggregation:** Clearly define project outcomes, group them into thematic clusters (outcome areas), and map their logical structure.
2. **Stakeholder Identification:** Identify specific stakeholders (individuals, communities, or systems) who will be affected by each outcome.
3. **Indicator Selection:** Choose measurable indicators for tracking progress towards each outcome, providing a quantitative dimension to the impact.
4. **Alignment with Official Taxonomies:** Link outcomes to official frameworks (e.g., SDGs, ESG) to facilitate reporting and external validation.
5. **Means of Verification:** Determine data collection methods (surveys, interviews, etc.) to quantify each indicator, ensuring reliable measurement.

This framework equips project teams with the tools to monitor impact methodically, making outcomes both measurable and reportable.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. *Sustainable Development Goals*. <https://sdgs.un.org/goals>
2. *Global Reporting Initiative*. <https://www.globalreporting.org/>
3. *SASB*. <https://sasb.ifrs.org/>
4. *CSRD*. https://finance.ec.europa.eu/capital-markets-union-and-financial-markets/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting_en
5. *Social Value UK*. <https://socialvalueuk.org/>

Verification of the participant's understanding

Format: **Multiple-choice questions**

Question 1

What is the primary purpose of an Impact Monitoring Framework?

- A. To design new financial tools for investment purposes.
- B. To systematically assess and document the outcomes of projects aimed at creating social, economic, environmental, and cultural changes.
- C. To measure employee productivity within an organization.
- D. To create advertisements for social initiatives.

Question 2

What are indicators in the context of an impact framework?

- A. Tools to gather feedback from stakeholders.
- B. Metrics used to quantify and measure outcomes, ensuring they are monitorable and communicable.
- C. Long-term goals associated with project outcomes.
- D. Reports submitted to funding organizations.

Question 3

What is the role of official impact taxonomies in an impact framework?

- A. To identify stakeholders for project outcomes.
- B. To establish external validation and reporting standards for outcomes.
- C. To collect data using interviews and surveys.
- D. To group outcomes into thematic clusters.

Lesson 17

Social return on investment

Expected time effort: 10 minutes

Main page content

The **Social Return on Investment (SROI)** is a comprehensive methodological framework designed to measure the *extra-financial value* generated by an intervention, while accounting for the resources invested and the counterfactual scenario, that is, what would have occurred in the absence of the intervention. Rooted in the traditional cost-benefit analysis paradigm, SROI expands this approach by quantifying *social value* through a set of well-defined indicators that are directly associated with the outcomes achieved.

The methodological robustness of the SROI model is grounded in **eight foundational principles**, which collectively inform a structured six-phase analytical process.

1. **Involve stakeholders:** Ensure meaningful engagement of stakeholders throughout the process to capture their perspectives and experiences.
2. **Understand what changes:** Identify and articulate the pathways of change and the outcomes resulting from the intervention.
3. **Value the things that matter:** Assign appropriate monetary values to outcomes that stakeholders perceive as significant.
4. **Only include what is material:** Focus on information and outcomes that are critical to an accurate and fair representation of value.
5. **Do not overclaim:** Avoid inflating results by attributing outcomes solely to the intervention, recognising other contributing factors.
6. **Be transparent:** Document and disclose all methodological choices, assumptions, and limitations to maintain credibility and reproducibility.
7. **Verify the result:** Subject the analysis to external validation to ensure the accuracy and robustness of findings.
8. **Be responsive:** Use the insights generated to adapt, improve, and inform decision-making processes.

Such principles must be applied throughout a path that begins with impact framing and develops through data gathering. Once you have all your quantitative and qualitative data stored and properly interpreted, you can begin the SROI analysis.

The Social Return on Investment monetises the social value generated by an intervention through seven key stages:

Stage 1: Scope and stakeholder identification:

The initial phase of an SROI analysis focuses on addressing fundamental planning considerations by defining the purpose, objectives, and context of the analysis while identifying and consulting stakeholders to ensure all significant changes are included.

This phase also establishes the temporal scope of the analysis and determines whether it will be **evaluative (ex-post) or forecasting (ex-ante)** in nature (Human Foundation, 2012; SROI Guide, 2012).

A critical component of Phase 1 involves identifying and engaging stakeholders, defined as individuals or organisations that experience change—either positive, through value creation, or negative, as a result of destroyed value—as a result of the intervention. This step confirms that no significant stakeholders are omitted and that all material changes are appropriately identified, adhering to the principle of materiality. According to the SROI framework, a material aspect—be it social, economic, or environmental—is one that significantly impacts an organisation’s ability to generate value in the short, medium, or long term and influences stakeholders' decision-making.

These initial steps involve the active participation of stakeholders to ensure that all significant changes are accounted for, qualitative dimensions are taken into consideration and that key stakeholders are aware of which elements will be part of the SROI calculation.

Stage 2: Mapping outcomes

Outcome mapping ensures that SROI analysis builds upon existing impact assessment tools, if any, or that any SROI calculation starting from scratch is based on a structured impact map.

If an ex-post analysis is conducted after an entire impact assessment, then you can select the outcome inserted in your impact framework.

If you are in a scenario of an ex-ante or ex-post analysis without a previous impact assessment, you should create a synthetic ToC or Impact Framework. These tools are typically presented as a table (e.g., an Excel file) organised into columns by stakeholder group, detailing key project-related information such as:

- **Input**
- **Activity**
- **Outputs**
- **Outcomes**
- **indicators**

It is important to ensure a balanced selection of indicators, which may include:

- **Subjective indicators:** Self-constructed measures suggested directly by stakeholders.
- **Objective indicators:** Observed phenomena or measurable changes occurring during the intervention.

If you start the process from the beginning, it is essential to determine from which sources data will be gathered. Data collection can utilise various research methods, described in the next subtopic. Still, the decision on which to use depends on whether the SROI analysis is forecasting (predictive) or evaluative (retrospective):

- In a **forecast analysis**, identifying data sources and collection methods provides organisations with a framework for capturing outcomes during project implementation.
- In an **evaluative analysis**, data must be drawn from pre-existing records or other reliable sources, reflecting outcomes that have already been achieved.

Stage 3: Evidencing outcomes and giving them a value

To proceed, SROI analysis involves a series of structured activities aimed at mapping and selecting tangible outcomes that can be monetised from the project. Cashable outcomes are those that can be translated into a monetary value by assigning a financial proxy to them. This leads to **monetisation**, which involves assigning a monetary value (or **financial proxy**) to each selected outcome. By doing this, SROI estimates the social value of these non-marketed assets and expresses it in monetary metrics.

Several techniques can be applied for monetisation, depending on the context, availability of data, and time for research.

- **Contingent valuation:** Stakeholders are directly asked to assign a monetary value to the benefits they perceive.
- **Revealed preference:** The value is inferred from comparable goods or services with an established market price (e.g., leisure, health-related benefits).
- **Travel cost method:** Estimates the amount users are willing to spend (in time and resources) to access a specific good or service.
- **Average household spending:** Assesses household spending patterns on non-essential activities, such as leisure, personal well-being, or hobbies.

Once this process is completed, each outcome (or one of its indicators) is linked to a financial item (proxy) that represents a (possible) monetary value of the outcome itself. While selecting proxies, it is fundamental to provide their **sources** to ensure accountability. By systematically implementing these steps, this phase ensures that outcomes are not only evidenced but also appropriately valued, enabling a rigorous quantification of social value within the SROI framework.

Once the financial proxies are selected, the next step is to calculate each outcome and the overall Gross Social Value (GSV). This involves a single multiplication:

1. Multiplying the quantity of the indicators for each outcome (e.g., the number of stakeholders experiencing the change) by its assigned monetary value (financial proxy).
2. Add every single outcome GSV to calculate the overall GSV.

The resulting figure represents the total value generated by the outcome, before considering mitigating factors such as deadweight or attribution.

Stage 4: Establishing Impact by defining Mitigators to establish Net Present Value (NPV)

To prevent overestimation of impact, four key elements must be analysed and quantified for each outcome: deadweight, displacement, attribution, and drop-off. By accounting for external factors, mitigators refine the attribution of outcomes to the intervention, preventing overestimation or misrepresentation.

1. **Deadweight** represents the proportion of the outcome that would have occurred regardless of the intervention. It is estimated using comparison groups or benchmarks. For instance, if participants in a job training program had found employment without attending, that probability is deadweight.
2. **Displacement** assesses whether the positive outcome for one group has resulted in negative effects for others. This captures substitution effects and unintended consequences.
3. **Attribution** measures the contribution of external factors—other organizations, projects, or actors—to achieving the outcome. It identifies the share of the outcome attributable specifically to the intervention.
4. **Drop-off** reflects the decrease in the intensity of the outcome over time. Applied to outcomes lasting more than one year, drop-off quantifies the progressive decline in impact. It is applied only to the NPV of outcomes that have a duration higher than 1 year (see phase 7)

Apart from mitigators, an essential aspect of outcome measurement is determining the **duration** of the effect. Some outcomes may continue to generate value after the intervention ends. Duration can be estimated using two approaches:

1. Conduct direct consultations with beneficiaries to assess the longevity of the outcome.
2. Reference to existing studies on similar beneficiary groups to approximate outcome duration based on comparable data.

The final calculation of impact involves multiplying the financial proxy of each outcome by its quantity and subtracting the respective percentages of deadweight, displacement and attribution. The adjusted outcomes are then aggregated to determine the **net impact generated or NPV**.

$$NPV = GSV \text{ filtered by MITIGATORS}$$

Stage 5: calculating SROI

Finally, the SROI can be calculated; delving deeper into the analysis, it is helpful to recall the SROI formula, which is expressed as a ratio. The numerator represents the total quantification of Net Social Value (NPV), while the denominator reflects the investment made to fund the activities. The result means the SROI indicator.

$$\text{Present value} / \text{Input value} = \text{SROI}$$

SROI calculation example

Below we outline a **SROI calculation example** adapted from Busacca & Caputo, 2019.

If an *X* number of outcomes has a **duration** of 4 years, the calculation of the value of the *x* number of outcomes in the years following the first is calculated as follows:

1. Impact in the first year: € 1,539.00 (A)
2. Impact in the second year: Impact in year 1 minus the drop-off; € 1,539.00 less 10%; € 1,539.00 × 0.9 = € 1,385.10 (B)
3. Impact in the third year: Impact of year 2 minus drop-off; € 1,385.10 less 10%; € 1,385.10 × 0.9 = € 1,246.59 (C)
4. Impact in the fourth year: Impact of year 3 minus the drop-off; € 1,246.59 less 10%; € 1,246.59 × 0.9 = € 1,121.93 (D)

The final step involves calculating the SROI which is the result of a **ratio between the discounted value of the benefits and the total investments**.

The summarized result obtained is a SROI of 1.53 (for every euro invested, 1,53 € of social return was generated).

Final NPV for the *x* number of outcomes is the sum of A+B+C+D = 4292.62,00 €

Stage 6 of SROI: Reporting, Using, and Embedding

This phase is critical for ensuring that the analysis achieves its ultimate purpose: fostering transparency, accountability, and strategic decision-making.

The **reporting** aspect involves compiling the results of the SROI analysis into a clear, comprehensive, and accessible format. The report typically includes an overview of the project's objectives, the methodology employed, the stakeholders engaged, and the outcomes measured. The report also addresses assumptions, limitations, and sensitivity analyses to validate the findings and demonstrate their robustness.

In the **using** phase, the insights gained from the SROI analysis are applied to inform decisions, refine strategies, and optimize resource allocation. This could involve prioritizing activities that deliver higher social returns, redesigning underperforming interventions, or

identifying areas where additional resources are needed. Sharing results with stakeholders not only validates their contributions but also encourages collective ownership of the outcomes.

Embedding involves integrating the lessons learned into the organization's culture, policies, and practices. By institutionalizing SROI as a framework for evaluation and planning, organizations can ensure ongoing accountability and improvement. Embedding also fosters a culture of learning, encouraging staff and stakeholders to align their efforts toward achieving sustained social value.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Social Value UK. *SROI Guide*.
<https://www.socialvaluelab.org.uk/wp-content/uploads/2016/09/SROI-a-guide-to-social-return-on-investment.pdf>
2. Sopact. *SROI Calculator*. <https://www.sopact.com/guides/social-return-on-investment-sroi>
3. Busacca & Caputo (2019). *Valutazione, apprendimento e innovazione nelle azioni di welfare territoriale. Lo SROI-Explore per i Piani Giovani in Veneto*, Edizioni Ca' Foscari.
4. Luigi Corvo, Lavinia Pastore, Marco Mastrodascio, Denita Cepiku; The social return on investment model: a systematic literature review. *Meditari Accountancy Research* 19 December 2022; 30 (7): 49–86. <https://doi.org/10.1108/MEDAR-05-2021-1307>

Verification of the participant's understanding

Format: **Multiple-choice questions**

Consider the example of the SROI calculation proposed and assume a **total investment of 2.800 €**, which is the final result:

- A. 2,33
- B. 1
- C. 0,85
- D. 1,53

Lesson 18

Data gathering tools and strategy

Expected reading time: 8 minutes

Main page content

The ability to collect, analyze, and effectively communicate data is an essential competence for any social impact manager. Within the context of social impact initiatives, data serve as a cornerstone for making informed and evidence-based decisions, while also fostering consensus and engagement among stakeholders and the wider community. This subtopic equips participants with the theoretical knowledge and tools to understand the basics of theory of data, and data management, describe accurately how to select proper data collection tool to build an effective data gathering applicable to conduct impact assessment on project, service and programs.

Introduction to data supply chain

First, it is necessary to give a specific definition of data and explain why they are useful. By **data** we mean “*what is immediately present to knowledge, prior to any form of processing*” while a **statistical data** is “*it measure of a collective phenomenon resulting from the observation of the individual phenomena that comprise it, that is, the set of statistical units related to individual cases* (for example, the number of births in a year or the population of a country)”. (Translation from Treccani Italian dictionary).

Data are therefore necessary to be gathered for several reason (research, internal investigation, reporting or communication), but what they substantially abilities is the quantifiability and communicability of qualitative processes and results. Data can be interpreted as the raw material of a supply chain, namely the data supply chain. The concept of the **data supply chain** provides a comprehensive framework for understanding the flow and management of data within social impact initiatives. Similar to a traditional manufacturing supply chain, the data supply chain encompasses the lifecycle of data, from its initial collection at the "raw material" stage to its eventual transformation into actionable insights or tangible products for decision-making. This approach emphasizes the value-added at each stage of the chain, offering a structured way to assess, quantify, and enhance the utility of data.



Figure 1: data chain path

1. **Identify** data by determining the exact data needed to assess a project’s impact. This involves aligning intended outcomes with measurable indicators to ensure relevance. Decisions about data types—quantitative (e.g., statistics) or qualitative (e.g., feedback)—and potential sources, such as participants or databases, are made to guide the collection process effectively.
2. Select **Tools** by choosing the appropriate tools for data collection. Tools’ options will be described below.
3. Develop and implement a **data gathering strategy** plan for collecting data outlining timelines, responsibilities, and tools. This ensures the process clear and manageable.
4. **Clean** data by addressing errors, inconsistencies, or gaps. Tasks include removing duplicates, standardizing formats, and resolving anomalies to maintain data integrity.
5. **Analyse** data and deliver a **final product** converting data into actionable insights. Analysis reveals the results of your impact assessment ore research, producing outputs like reports or dashboards that can be disseminated to various stakeholders.

Identify data sources and select data gathering tools

Before you collect data elements, you must determine which data can be collected from what sources. For each indicator, you need at least one data source. Data sources might be all members of the target group and other stakeholders, as well as internal and external documents. Once you’ve identified a data source, you must identify the method by which you’ll collect the information, connecting the source of data to the proper data gathering tools.

The variety of data collection methods available makes the selection process both complex and crucial and consulting experts or representatives from similar projects or organizations can provide valuable insights. The decision should be based on the relevance and meaningfulness of the data to the organization’s goals and the evaluation’s objectives.

The first decision to made is to choose in between collecting new data, utilise existing data or collect both.

- **Utilising Existing Data:** effective data collection planning begins with assessing the availability and usability of existing data. Additionally, it is fundamental to investigate if the organisation already possesses some data on which to base the analysis on.
- **Collecting new data:** If the existing data isn't enough, or no relevant data yet exists, you'll have to create your own. The approach you choose will depend on the resources available to you, but also particularly on the scope and level of detail you need for the information about impact.

Several data-gathering tools exist. They are described below specifying its key characteristics and best context of use.

1. **Monitoring forms** act as systematic tools to capture key data points and observations throughout the implementation of a project. These forms are tailored to track activities, resources, and results and provide an ongoing update of progress and allow for consistent documentation, making it easier to identify patterns or irregularities that may require attention.
Type of data: quantitative, qualitative
2. **Databases** serve as the central repository for all data collected during the project. This tool ensures that information from various sources—whether quantitative metrics, qualitative feedback, or operational data—is organized, accessible, and interconnected. For each project a specific database can be created as a simple Excel sheet, inserting in it all the necessary information and indicators.
Type of data: quantitative
3. **Network Analysis Matrix** is a powerful tool to map and evaluate the relationships, connections, and influence among various actors involved in the project. By visualizing the interactions between stakeholders, the matrix highlights the flow of resources, information, and collaboration within the network.
Type of data: quantitative, qualitative
4. **Individual surveys** administered to a specific targets direct and measurable feedback on their experiences, perceptions, and the impact they experimented thanks to the the project. Designed with both closed and open-ended questions, these questionnaires provide highly valuable quantitative data while allowing respondents to share their personal insights.
Type of data: quantitative, qualitative
5. **Qualitative interviews** with key stakeholders or project coordinators provide in-depth insights into the experiences, perceptions, and outcomes associated with the initiative. These interviews delve into the nuances of project implementation, offering context that quantitative data alone cannot capture
Type of data: qualitative

6. **Focus group** is useful for gathering qualitative insights through facilitated discussions among a small group of participants. This method allows for a deeper understanding of collective perceptions, shared experiences, and group dynamics related to a project or intervention.

Type of data: qualitative

7. **Direct observation** involves systematically monitoring and recording behaviors, interactions, and activities in real-time within the project's context. Observational methods are particularly useful for capturing non-verbal cues, group dynamics, and environmental factors that might not be reported through other means.

Type of data: qualitative

8. **Official statistics and policy documents** serve as an authoritative source of data collected and published by government or other reputable institutions. They provide standardized, aggregated information on demographics, economics, health, or education, offering a foundational understanding of the broader social or economic context in which a project operates

Type of data: quantitative, qualitative

9. **IoT Sensors** are advanced tools for collecting real-time, objective data, especially useful in environmental impact projects. They can track environmental metrics, resource use, or activity levels in specific areas, providing precise, continuous data

Type of data: quantitative, qualitative

TOOL	QUANTITATIVE	QUALITATIVE
Monitoring forms	x	x
Databases	x	
Network Analysis Matrix	x	x
Individual surveys	x	x
Interviews		x
Focus group		x
Direct observation		x

Figure 2: Synopsis of data gathering tools

Develop and Implement a Data Gathering Strategy

Data collection is a critical component of any evaluation process and a systematic and well-structured approach ensures that the data gathered is reliable, relevant, and useful for analysis. The process involves three main steps: creating a data collection plan, identifying appropriate data sources, and gathering the data itself. A data gathering strategy describes

the exact steps as well as the sequence that needs to be followed in gathering the data. The document ensures that everyone on the project team is on the same page with regards to the data plan while and that information is correctly transmitted to the people that will actually provide for the data. Generally, it is fundamental to clarify when, how and by who data should be collected. It provides a masterplan in GANTT chart format that highlights which means of verification will be used, who is responsible for its issuing and in which time span is it supposed to be activated. Here is the typical structure of a data collection strategy.

TOOL	Responsible	J A N	F E B	M A R	A P R	M A Y	J U N	J U L	A U G	S E P
Databases	To be defined									
Monitoring forms	To be defined									
Survey - Students (ex ante)	To be defined									
Survey - Students (ex post)	To be defined									
Network Analysis	To be defined									
Interviews	To be defined									

Figure 3: The data-collection strategy

Data analysis and interpretation

Once your data are available you can proceed to data analysis that is the process of extracting insights from raw information to deliverable tangible products such as report ad. It involves summarizing data, identifying patterns, and reason the key findings, which are essential for every evaluation process. The two primary approaches to data analysis are quantitative and qualitative methodologies, each serving distinct but complementary purposes.

- **Quantitative analysis** uses numerical data and often employs descriptive statistics, forecasting models, and inferential tests. It is numerical and can be counted or expressed mathematically, be analysed using statistical tests and computations and its results are often visualized through tables and graphs, making findings accessible and interpretable.
- **Qualitative analysis**, in contrast qualitative analysis focuses on understanding underlying behaviours, motivations, and experiences. Qualitative data enhances quantitative findings by adding context, texture, and depth. It is particularly valuable

for defining problems, generating new research ideas, and providing rich insights for program evaluation.

- **Quanti-qualitative** analysis is also possible, and highly recommended, and consist in a mixture of the two previous and by combining quantitative and qualitative approaches, organizations can ensure a comprehensive evaluation that captures both measurable outcomes and the nuanced experiences of stakeholders.

The results of your analysis can then be disseminated and communicated to external stakeholders such as policy makers, funding authorities and citizenships through different **final product** such as impact report and dashboards An impact report is a detailed document that narratively presents the outcomes and value generated by a project or organization. It typically includes the methodology used to measure impact, key findings, data analysis, and insights. An impact dashboard, on the other hand, is an interactive, visual tool that displays data on the project's activities, outputs, and outcomes, it valorises mostly quantitative results.

Additional reading materials

Please note that these materials are not mandatory and not included in the expected module's effort.

1. Peersman, G. (2014). "Overview: Data Collection and Analysis Methods in Impact Evaluation, Methodological Briefs: Impact Evaluation 10, UNICEF Office of Research, Florence". Available at this [link](#).
2. Fruchterman, J. (2016). "Using Data for Action and for Impact". Stanford Social Innovation Review, 14(3), 30–35. <https://doi.org/10.48558/24MM-J709>, available at this [link](#).
3. M. Lucchini (2018) Social Research Methodology Pearson, Milano
4. Unicef reporting system [All reports | Innocenti Global Office of Research and Foresight](#)

Verification of the participant's understanding

Format: **Practical exercise**

Please, select the most appropriate data gathering tools for your activity and explain why.

Partners

