

## SOCIAL INNOVATION – A CASE STUDY

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**Purpose:** The purpose of this paper is to present a practical example from the field of social innovation implementation.

**Design/methodology/approach:** The results of the analysis of scientific publications in the field of management science indicate the need to continue research in the field of social innovation. The studies are part of the research area related to social entrepreneurship. The studies were conducted using desk research, interview and observation methods. The study covered an association – an organization belonging to the third sector of the economy. The organization adopts goals of a social nature, and at the same time operates according to market rules. It uses multiple sources of income.

**Findings:** The effects of implementing the innovation include the development of the organization socially and financially. The innovation affects the improvement of the competence of employees, contractors, interns, trainees, volunteers in the field of functioning of senior citizens, draws their attention to the problems of the elderly. The innovation is also an important element in the economization of the Association's activities. It is part of a strategy to diversify the organization's sources of funding.

**Originality/value:** The results of the analysis of scientific publications in the field of management science indicate the need to continue research in the field of social innovation. The studies are part of the research area related to social entrepreneurship. Research results may be interesting for scholars exploring social innovations, management students, and non-governmental organizations.

**Keywords:** social innovation, organization development, case study.

**Category of the paper:** Research paper.

### 1. Introduction – social innovation

Modern innovation is characterized by an interdisciplinary approach and high dynamics of change resulting from transformations taking place in all areas of the economy (Olejniczuk-Merta, 2013). The literature distinguishes, for example, product innovation, process innovation,

organizational innovation, social innovation. Olejniczuk-Merta (2013) points out that the distinction of the different types should not be considered as the result of separate independent processes – they rather determine and complement each other. Changes in one area affect the process of change in other areas: technology, engineering, organization or in the social sphere.

Social innovations are of interest to many areas of science, among others: economics, management, sociology, politics, anthropology (Hilarowicz, 2016; Kowalewski, 2014). They are classified as open innovation (Majchrzak, 2018). They can be micro- or macro-structural, local or entrepreneurial innovations (Michna, Męczyńska, 2016).

The purpose of social innovations is to improve the quality of life of society and/or isolated social groups. Their effect is *to provide a significant part of society with specific results of activities and the forms that these results take, in accordance with its demand determined "tailor-made" for a narrower or wider group of addressees* (Olejniczuk-Merta, 2013). They also result in changes in social attitudes, behavior or lifestyles (Baran, 2016; Majchrzak, 2018; Baran, 2020; Olejniczuk-Merta, 2013) emphasizes that *social innovation is expressed in the changes taking place in the social structure of the population, in the patterns of customs, human attitudes, and even the general culture of the nation.*

The special importance of social innovation is pointed out, for example, by the Polish Agency for Enterprise Development (INNOES). From the documentation of the INNOES project ("Grant program for social innovation in the area of accessibility", co-funded by the European Social Fund under the Operational Program Knowledge Education Development 2014-2020) it follows that social innovation can be understood as "new, more effective methods and tools for solving social problems in the area of accessibility for older people with limited mobility or perception and people with disabilities, consisting of creating and testing new solutions or improving existing ones, while taking care to optimize them, according to the idea of 'more for less' ". In addition, it is stressed that *the result of a social innovation does not necessarily have to be a new technological product; instead, it can be a new value for the customer that is designed to improve the quality of his or her life. Social innovation is the result of a learning process rather than the result of invention* (INNOES).

The main features of social innovations include: their innovative nature, taking equal forms (product, service, process), having a positive impact on society, combining social and economic goals. Social innovations are promoted and developed by various groups of entities (companies, public institutions, NGOs) (Wronka-Pośpiech, 2015, 2015b; INNOES; Furmańska-Maruszak, Sudolska, 2016).

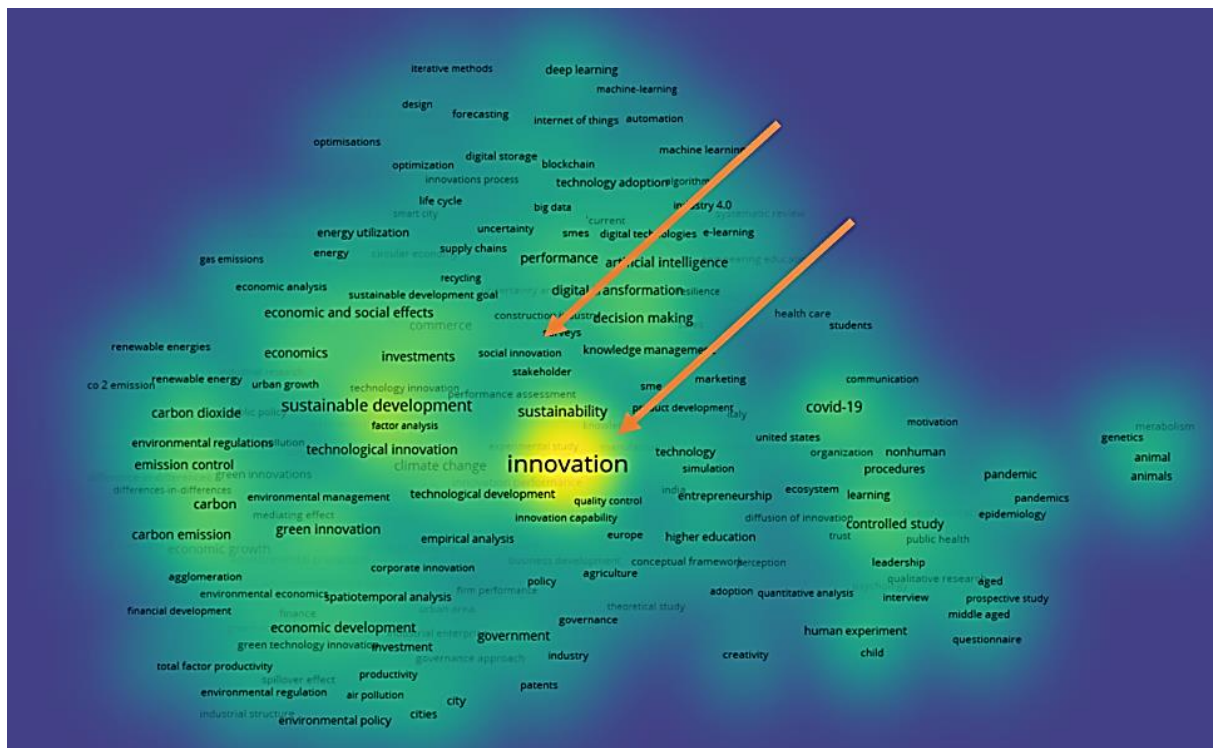
Publications found in the Scopus database were analyzed in an attempt to identify the research gap. Publications containing the phrases *innovation* or *social innovation* in the title, abstract or keywords were searched. The results were limited to English-language articles from scientific journals. More than 263,000 results were obtained this way. The analysis of publications by year of publication indicates a very high interest of researchers in the area in question (Table 1) and an increase in this interest in the analyzed period (2015-2022).

**Table 1.**

Number of searched publications in Skopus database by year of publication

	The range of keywords searched for	2015	2016	2017	2018	2019	2020	2021	2022
1	<i>innovation or social innovation</i>	11484	12571	13500	14863	17375	20033	22390	28594
2	<i>social innovation</i>	128	152	232	225	301	377	373	481

The results were then limited to 2022 open access publications from the area of *Business, management and accounting*, yielding 7238 results. Finally, 2000 publications were analyzed in VOSviewer (due to the limitations of the program). In order to increase the readability of the map, it was limited to keywords occurring a minimum of six times. The main keyword was *innovation* (Figure 1) - links (number of links to other keywords): 224, total link strength (strength of links): 353, occurrences (number of occurrences of the keyword): 421. In contrast, the issue of *social innovation* was a rather infrequently addressed area compared to *innovation*: links (number of links with other keywords): 37, total link strength (strength of links): 41, occurrences (number of occurrences of the keyword): 14.



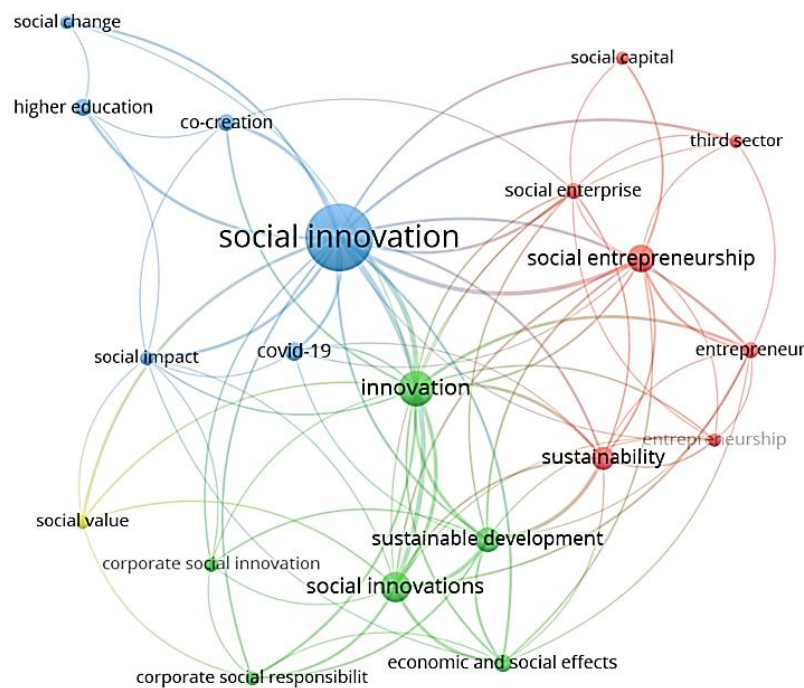
**Figure 1.** Result from VoSviewer (innovation and social innovation).

The preparation of the database for the *social innovation* issue was then repeated. The procedure as before was adopted. Figure 2 presents the connections occurring between the social innovation issues and other keywords. Three main research areas (thematic clusters) were identified and color-coded in the figure: related to entrepreneurship, sustainability and social impact (in conjunction with the issue of higher education – (Belcher et al., 2022; Greene, 2022; Otten et al., 2022). Keywords such as third sector, social capital, social entrepreneurship, social

enterprise appeared in the field of entrepreneurship. The number of occurrences of a given keyword and the strength of its associations are included in Table 2.

Based on the analysis, we can conclude that:

- The issues of innovation and social innovation are topical matters.
- The issue of innovation is a concept more often analyzed by researchers than social innovation.
- Currently, the issue of social innovation is analyzed within the framework of three main research areas: entrepreneurship, sustainable development and social impact (in conjunction with the issue of higher education).



**Figure 2.** Result from VoSViewer (social innovation).

**Table 2.**

*Number of occurrences of a keyword and the strength of its links by thematic clusters*

Name of thematic cluster	Keyword	Number of occurrences	Strength of links
Entrepreneurship	Social entrepreneurship	21	37
	Sustainability	15	32
	Entrepreneur	7	23
	Social enterprise	7	17
	Entrepreneurship	5	10
	Third sector	5	9
	Social capital	5	7
Sustainable development	Social innovation	126	113
	Innovation	36	70
	Sustainable development	18	46
	Economic and social effects	9	24
	Corporate social responsibility	6	17
	Corporate social innovation	6	8

Cont. table 2.

Social impact	Social innovations	25	59
	Social impact	6	15
	Co-creation	8	13
	Covid-19	10	11
	Higher education	8	9
	Social change	5	6

Table 3 shows selected publications in the field of entrepreneurship. The analysis of the publications shows the diversity of the methodology of the research conducted. The authors perform quantitative research using a survey questionnaire (Sanzo-Pérez et al., 2022; Zajda, 2022), but also qualitative research based on case studies (Sacchetti, 2022; Scuotto et al., 2022). The authors focus on NGOs (Morrar, Baba, 2022) or social enterprises (Scuotto et al., 2022), or their partnerships (Sanzo-Pérez et al., 2022; Sacchetti, 2022).

Scuotto et al. (2022) investigate how social entrepreneurship organizations adapt their business model to develop social innovation. Sanzo-Pérez et al. (2022) noted "the barriers social enterprises face to gain access to traditional sources of funding are pushing them to reinforce their business models and rely more on commercial activities". Sacchetti (2022) and Tuckerman et al. (2022) pay attention to the problem of development of the organization in social and financial terms. Sacchetti (2022) indicated that organizational capabilities enable social enterprises to pursue social objectives and sustainable sources of revenue. Tuckerman et al. (2022) pointed that "sharing social innovation information across organizational boundaries are complicated by the dual bottom line of social impact and financial sustainability".

**Table 3.**

*Selected research results from the field of entrepreneurship*

Authors	Methodology/approach	Purposes/main findings
Kusioi, Kudelko, Borges, Delic, Stroila (2022)	Comparative analysis (multi-case method) in five European rural regions: Croatia (Slovenia), Germany (Münsterland, Saxony-Anhalt), Poland (Małopolska), and Portugal (Alto Minho).	The aim of the article is to investigate societal and economic challenges and their innovative solutions. The comparative analysis reveals that most essential activities aimed at alleviating the development problems of rural areas include education of local communities, improvement of economic and digital infrastructure, activities supporting production and promotion of local products, promotion of cooperation between local communities and producers, and stronger orientation of local policy towards financial support of production enterprises and farms.
Morrar, Baba (2022)	Qualitative research. 24 semi-structured interviews with Palestinian NGOs.	The authors focus their discussion on the challenges that social innovators are facing in their endeavor of solving wicked social problems within an extreme institutional environment. The authors theorize three barriers that hinder social innovation in such contexts: institutional trap, effectiveness trap and sustainability trap.

Cont. table 3.

Sacchetti (2022)	Case study analysis: consortium of 22 organizations that operate under the umbrella of Harmony, the fictional name of a WISE founded in Veneto, Italy.	This study investigates which organizational capabilities (OC) enable Work Integration Social Enterprises (WISEs) to pursue both social objectives and sustainable sources of revenue. It does so by focusing on the nature and use of OC that support both the social and the economic sustainability of this type of enterprise.
Sanzo-Pérez, Rey-García, Álvarez-González (2022)	Survey: a sample of 80 social enterprises partnering with nonprofits in Spain.	The barriers social enterprises face to gain access to traditional sources of funding are pushing them to reinforce their business models and rely more on commercial activities. Authors attempt to analyze whether partnerships between social enterprises and nonprofits strengthen accountability to beneficiaries without hindering accountability to other stakeholders, thus allowing both social and economic objectives to operate together.
Scuotto, Cicellin, Consiglio (2022)	Multiple comparative case studies and narrative analysis. Social entrepreneurship organizations in Italy.	This paper analyses how social entrepreneurship organizations adapt their business model to develop social innovation. By developing a conceptual framework, the paper enhances current understanding of the social dimensions of social entrepreneurship organizations' business model.
Tuckerman, Roberts, Whittam (2022)	Qualitative case studies with Scottish social enterprises. The researcher undertook participant observation for a year as well as conducting interviews and reviewing documents of the case study organizations.	Authors found that the approaches of sharing social innovation information across organizational boundaries are complicated by the dual bottom line of social impact and financial sustainability. While sharing for free can escalate social impact, sharing for a fee can bring much needed income but restrict access to knowledge.
Zajda (2022)	Survey of 400 rural NGOs from Poland.	What features distinguish NGOs that are experienced in implementing social innovation? NGOs implementing social innovation are distinguished by: <ul style="list-style-type: none"> <li>• cooperation with other organizations and public institutions;</li> <li>• human and financial resources.</li> </ul>

## 2. Research methodology

The results of the analysis of scientific publications in the field of management science indicate the need to continue research in the field of social innovation. The research is part of the study area related to social entrepreneurship. The purpose of this paper is to present a practical example from the field of social innovation implementation. The study was conducted by desk research, interview and observation. The analysis of the documentation of the studied organization included the Articles of Organization, the completed *Competition Form*, the *Implementation Agreement* and project documentation. Information contained in the National Court Register, the Association's website and social media was analyzed. In July 2022, an unstructured interview was conducted with members of the Board of Directors regarding the

goals of innovation implementation and the Association's development directions. In September 2022, an open observation was carried out to identify how the geriatric simulator works. An interview was conducted with a user (a volunteer teenager) regarding his feelings and impressions of using the product.

### 3. Characteristics of the organization and its activities

#### Association

The Stowarzyszenie na Rzecz Rozwoju Społeczności Lokalnej “Mocni Razem” (Association for Community Development "Strong Together") obtained entry in the Register of Associations in 2012. It bases its activities on the community work of the Association's members and volunteers, it also employs employees and contractors (Articles of Association).

The vision of the organization is contained in the phrase: "The Association supports and develops pro-social attitudes and civic activity. It creates change and gives COLOR to local communities." The mission is: "Supporting individuals and communities to develop, create reality, change themselves and the world for the better" (Own website...).

The association's statutory objective is *cultural, physical culture and sports, charity, health care and social welfare activities*. The statutory objectives include *assisting residents in acquiring knowledge and qualifications to perform social and professional functions in society, activating and integrating the local environment, supporting the social activity of residents, including, inter alia, such social groups as the disabled, the unemployed, children and youth, seniors and other social groups requiring support due to difficult life or material circumstances*. The association pursues its goals by, among other things: *creation and implementation of programs, activities aimed at the needs of residents, education and improvement of social skills, cooperation with local government institutions, social and economic entities, implementation of projects financed from domestic and foreign sources*. (Articles of Association).

#### Sources of funding

The association conducts unpaid and paid public benefit activities, as well as business activities (Table 1). In 2021, it obtained registration in the Register of Entrepreneurs. The Association's sources of funding are: membership fees, donations, bequests, inheritances, funds from public generosity and sponsorship and public collections, grants, deposits, subsidies, and income from paid and business activities. Paid activities include, among others, organization of fairs, exhibitions, congresses, staging of artistic performances, production activities related to films, videos. Economic activities include, among others, extracurricular

forms of education, activities of tourism organizers, publishing of books. The provisions of the organization's charter do not allow for the distribution of income from economic activities among members. The surplus of income over expenses is allocated to public benefit activities (Articles of Association; Financial statements; Czerwińska-Lubszczyk, 2022).

On the basis of the income statement for 2019 to 2021, a summary of the share of each funding source in the Association's total revenue was prepared. Income from unpaid activities accounts for the largest share. Grants from European funds are the most important in the financing of the Association. In 2021, funds from grants from the budget of the municipality - the City of Katowice, as well as from business activities appeared (Financial Statements).

**Table 4.**  
*Selected data from the Association's financial statements*

Item		Share in total revenue		
		2019	2020	2021
1.	Revenue from unpaid public benefit activities, including:	98,36	96,75	98,35
	Grants from the municipal budget	-	-	0,26
	Grants from European funds	97,65	93,59	95,72
	Donations from individuals	0,11	0,31	0,03
	Donations from legal entities	0,47	2,72	2,16
	Membership fees	0,13	0,13	0,18
2.	Revenues from paid public benefit activities	1,64	3,25	0,18
3.	Revenues from economic activity	-	-	0,91
4.	Other revenues	0,00	0,00	0,56
Total		100 %	100 %	100 %

## Activity

Over the ten years of its activity, the Association has implemented 19 projects, including eight from EU funds and one from the EEA Funds, targeting the needs of Katowice residents.

Since 2016, the Association has been active in Katowice's Zawodzie district, where it has its headquarters. In the district, in cooperation with the city of Katowice, EU projects are implemented, as well as its own original activities. Together with the residents, the Path of Good Thoughts (opposite the Transfer Center), the Sports Pedestrian Street for Children (next to the Sports Center), three murals were prepared in Zawodzie, and a Christmas tree appeared, which had never been present in the district before. Many intergenerational events were organized. A Moms' Club, a Volunteer Club and a Resident's Club were run. The association supports residents in writing local initiatives (Press materials...).

Since its inception, the association has also been associated with Szopienice. In 2019, the Youth Animation Center was launched. A space for the development of meetings, events. The Center was created through cooperation with the city of Katowice, using EU funds and the association's own funds. It hosted a Moms' Club, a Teenager's Club, an advice point for parents and young people. Many events were organized. In recent years, young people from the Center have carried out as many as 10 initiatives for the benefit of the local environment. In Szopienice, among others, a heart for caps, a motivational ladder, a mural of wings (on the



facade of the school building) were created on their initiative, and the Festival of Crazy Raccoons was held (Press materials...).

The Association directs a lot of activities to young people by engaging in volunteerism, implementing youth initiatives, trainings, workshops. In 2022 alone, as many as 56 volunteers worked with the Association, and this has been the case continuously since the association's inception. For many years, a fire dancing youth group was active at the association, with volunteers (Press materials...).

The association is oriented towards sharing knowledge and experience. In 2018, the seminar Strongmen with Strong Together - about making changes in oneself, in people and in local communities was organized in cooperation with the National Forum of Local Community Organizers and the Center for Supporting Local Activity - CAL from Warsaw. Study visits are received, trainings are conducted, meetings with students, internships and apprenticeships are carried out (Press materials...).

## **4. Social Innovation**

### **Funding**

The innovation was financed within the framework of the "Competition for the implementation of an innovation, improving work in a non-governmental organization" addressed to NGOs from the Silesian province. The organizer was the Forum of Non-Governmental Organizations of the Western Subregion and the ASK Cultural Association. The Forum of Non-Governmental Organizations of the Western Subregion is a voluntary agreement of autonomous NGOs. It has legal personality as a Union of Associations (Statut Federacji...). It is engaged in supporting NGOs, educating on the functioning and management of organizations, promoting their activities and representing them before the public administration (Rewolucja technologiczna w...). The activity was carried out as part of the project "Technological Revolution in the 3rd Sector" funded by the National Institute of Freedom – Center for Civil Society Development within the framework of the NOWE FIO Civic Initiatives Fund Program for 2021-2030. The project aims to "increase the level of knowledge and skills among representatives of Silesian NGOs in the use of new technologies, new tools and new methods to improve the quality of management and functioning of the organization - thus increasing the efficiency of work and institutional stability". A minimum of 50 people representing a minimum of 30 organizations should be directly supported. As part of the project, workshops were held to improve competencies and skills, counseling was offered, and educational and informational campaigns were conducted. In addition, an e-book will be

developed including recommendations and know-how on modern organizational management (Rewolucja technologiczna w...).

For the purposes of the competition, innovation was defined as *changes in the way the NGO operates, its products and services; changes in work organization, management, communication. These changes are intended to rationalize the functioning of the organization, adapt to changing legislation, requirements from customers, the market, etc.* The purpose of the Competition was to select the most interesting innovation that improves work in a non-governmental organization from the Western subregion of the Silesian Voivodeship. The main prize was the implementation of an innovation worth a maximum of PLN 15,000 (Rewolucja technologiczna w...).

### **The concept of innovation**

The Association's goal was to "introduce a social innovation, one that brings about a change in people's thinking, their perception of reality, changes their social attitudes towards the elderly" (Formularz konkursowy...). In its resources, the organization has psychologists, educators with experience in conducting educational meetings, which are the practical part of the innovation.

The concept of the innovation is based on bringing the world of senior citizens closer to young people, including groups of volunteers, interns, students, through the purchase of an old age simulator and conducting educational meetings.

Faced with the problem of an aging population, understanding the functioning of this age group determines the creation of optimal forms of support adapted to their needs and limitations. The innovation is part of the activities that the Association has been carrying out for many years in the field of activating seniors and the local community, emphasizing intergenerational activities. From 2014 to 2022, the Association implemented 4 projects whose beneficiaries were seniors. Young people, among other volunteers, are involved in activities for people 50+. Caregivers describe to them the functioning of the elderly, their limitations and possibilities. However, "description is not the same as opportunity to experience", especially in the form of play. The innovation will allow those working with seniors to "understand" and adapt forms of support to their needs.

### **Implementation of innovation and its impact on the development of the organization**

The stages of implementation of the innovation included: purchase of old-age simulators, development of a scenario for educational meetings on the specifics of senior age with the use of old-age simulators, training with the use of old-age simulators of the association's staff and volunteers, information (promotional) campaign. Activities were implemented from June 2022.

A geriatric simulator (old-age simulator) was purchased. Equipment of this type is used by universities and medical industry organizations. The simulator replicates the changes associated with old age. The equipment comes with solutions for adjusting the simulator or using its parts to the physical conditions of the participant. The set allows adapting its elements to the weight, height and age of the user, which makes it possible to be operated by children, adolescents, adults and even seniors. Elements of the simulator allow one to feel the dysfunctions afflicting the elderly. The kit consists of, among other things: goggles that limit vision, earmuffs that limit hearing, a collar that reduces neck mobility, arm and leg weights, elbow and knee joint braces, and prosthetic limbs that limit mobility.

The effects of implementing the innovation include the development of the organization in the following dimensions:

**Social: improving the competence of employees, contractors, interns, trainees, volunteers in the field of functioning of senior citizens.**

The Association hires employees and contractors. It cooperates with Universities by acquiring interns and trainees. It brings together volunteers (56 people in 2022). The Association extends support to the local community in its projects (171 people in 2020-2022). The innovation will influence the worldview of the people involved, draw their attention to the problems of the elderly.

**Financial: expanding service offerings to include educational meetings using an old-age simulator.**

The most important source of funding for activities in 2019-2022 was public funds (from EU funds). Paid and economic activities accounted for a small share of the organization's total revenue (less than 5%). The innovation is an important element in the economization of the Association's activities. A service will be prepared, the revenues from which will feed the organization's budget. This will be one of the elements of the strategy to diversify the organization's sources of funding in 2023 and beyond.

## 5. Summary

The results of the analysis of current scientific publications in the field of management science indicate the need for continued research in the field of social innovation. The present work is an attempt to respond to this need. The publication is part of the research area related to entrepreneurship associated with issues such as the third sector, social capital, social entrepreneurship, social enterprise. The study covered an association - an organization belonging to the third sector of the economy. The association adopts goals of a social nature, and at the same time functions in accordance with market rules, conducting paid and economic activities in addition to unpaid activities.

The purpose of the study was to present a practical example from the field of social innovation implementation. The effects of implementing the innovation include the development of the organization socially and financially. The innovation will contribute to increasing the competence of people associated with the organization: employees, contractors, interns, trainees, volunteers in the field of functioning of senior citizens. The innovation is also an important aspect in the economization of the Association's activities as part of a strategy to diversify the organization's funding sources.

Limitations of the conducted research may concern both literature analysis and empirical research. Limitations of the literature analysis may be related to the assumptions made, e.g.: the analysis included English-language publications only from the Scopus database, the results were limited to open access publications. Finally, due to the limitations of the VOSviewer program, 2000 selected publications were analyzed. In turn, the empirical research was carried out with the help of a qualitative method - a case study. The results of the research are related to the specifics of the operation of the particular entity studied.

The conducted literature analysis opens the possibility of conducting in-depth research in the field of bibliometric analysis in the area of social innovation. An interesting direction of empirical research seems to be to conduct quantitative research in the field of social innovation and its impact on the development of organizations.

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