Competitor Analysis Brief: Digital Citizenship and SEL Market Landscape

Prepared for: The Social Institute (TSI) Leadership and Data Operations Team

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Objective: To conduct a cross-analysis of competing organizations to evaluate their public health education models and engagement strategies compared to the Social Institute's approach.

CHES Competency: Area IV: Evaluation and Research – 4.4.5 Identify implications for practice; 4.5.1 Communicate findings by preparing reports and presentations; Area VII: Leadership and Management – 7.5.1 Facilitate the development of strategic and/or improvement plans

I. Executive Summary: The Crisis of Engagement

The K-12 education landscape is currently navigating an unprecedented crisis: a widening gap between the digital lives students actually lead and the static, adult-let "safety" curricula schools typically provide. While legacy organizations focus on restrictive policies and passive instruction, students are succumbing to what administrators call the "eye-roll factor"; a fundamental disengagement from social-emotional learning (SEL) that feels outdated and out of touch.

This brief establishes The Social Institute (#WinAtSocial) as the industry's "Gold Standard". By leveraging a peer-to-peer, gamified ecosystem powered by real-time student voice, TSI doesn't just teach digital citizenship; it empowers students to own it. This analysis examines primary

competitors, validating through peer-reviewed research why TSI's model is not just a preference, but a pedagogical necessity for modern student success.

II. The Gold Standard: The Social Institute (#WinAtSocial)

TSI has successfully built a "Blue Ocean" in a crowded market by moving away from fear-based instruction and toward a high-character, student-respected approach. Everything within the #WinAtSocial ecosystem is feedback-driven by student ambassadors to ensure it resonates with their actual digital experiences.

A. Core Differentiation

a. Authenticity via Peer-to-Peer Learning: Rather than top-down lectures, TSI utilizes a model where 85% of lesson time is dedicated to student-led discussion. This satisfies the core psychological need for "relatedness" and fosters a learning environment where students feel valued rather than monitored (Ukgoda, 2025).

b. Real-Time Data: TSI captures anonymous student insights in real-time, allowing administrators to see trends—like a rise in AI misuse or a dip in self-esteem—as they happen. This data-to-action capability is a significant determinant of student motivation as students are more engaged when their feedback leads to immediate visible shifts in school culture (Fisher et al., 2025).

c. Gamification: TSI replaces static slideshows with interactive gamified modules. Longitudinal research proves that such environments yield a 122% increase in the

"excellence rate" and a 25% improvement in average grades compared to traditional classroom learning (Lampropoulos, 2024).

III. Individual Competitor Profiles

1. Common Sense Media (CSM)
    a. **Strengths**: As a non-profit, they offer 100% free curriculum, which significantly lowers the barrier to adoption for budget-strapped school districts. They possess massive brand trust among parents, educators, and policymakers.
    b. **Weaknesses**: Their lessons are often static and non-interactive, leading students to find them unengaging or "childish". Because the content is fixed, it often fails to keep pace with rapidly shifting digital trends.
    c. **The TSI Edge**: TSI provides an active, gamified solution rather than a passive one. While CSM is a library of "what to know", TSI is a peer-to-peer laboratory for "how to lead", specifically outperforming CSM in modern relevance such as AI literacy and real-time student engagement.

2. Panorama Education
    a. **Strengths**: They are an industry leader in large-scale technology and analytics for district-level reporting on school climate and SEL. They excel at identifying specific gaps in student well-being.

b. **Weaknesses**: Panorama is a diagnostic tool, not an instructional one; it identifies problems but lacks a peer-led curriculum and insight pipeline to solve them. Their platform is not designed for peer-to-peer learning.
c. **The TSI Edge**: TSI acts as the active solution to Panorama's diagnosis. Panorama data highlights a well-being dip, whereas TSI provides a student, insight-driven lesson that addresses that concern in real-time.

3. Nearpod
    a. **Strengths**: An interactive platform with excellent real-time formative assessments like polls and quizzes. They have a vast library of flexible teacher-generated content.
    b. **Weaknesses**: Nearpod is a generalist tool for all subjects, which means it lacks a unified SEL message or a comprehensive family integration strategy. It is not a dedicated K-12 well-being brand.
    c. **The TSI Edge**: TSI offers a targeted, multidisciplinary focus on modern life skills (like social media culture and AI ethics) that general classroom tools lack. TSI guides students through character-driven decision making, not just interactive participation.

4. Wayfinder
    a. **Strengths**: Focused on purpose-learning, leadership, and building executive functioning skills. They use a dashboard for progress based on their core skills.

b. **Weaknesses**: Their curriculum focuses on broad, high-level life goals but has minimal emphasis on immediate digital stressors like group chat drama or navigating relationships.
c. **The TSI Edge**: TSI's focus on the immediate digital world is more relevant for today's students than broader life-purpose goals. TSI meets students where they actually are: online.

5. 7 Mindsets
    a. **Strengths**: Offers a comprehensive, research-backed SEL curriculum with multi-tiered measurement approaches.
    b. **Weaknesses**: They focus exclusively on SEL. They do not provide digital literacy, tech-safety, or media-literacy curriculum, leaving a massive gap in a student's modern education.
    c. **The TSI Edge**: TSI connects internal mindsets directly to external digital behaviors. By teaching character through the lens of technology use, TSI provides a more holistic and applicable life-skills education.

IV. Why TSI Wins

To maintain dominance, TSI must continue to lead with data that proves our model is not just "cooler", it's more effective.

1. The Science of “Right Now”
    a. Competitors offer surveys that are often “late” by the time they reach teachers. Scholarly research shows that timeliness is a significant predictor of student motivation (Fisher et al., 2025). When students see that their voice in a student ambassador meeting leads to immediate classroom shifts, their engagement skyrockers because they see their input as vital to the process.
2. The Return on Investment (ROI)
    a. A landmark study from Columbia University found that for every $1 invested in SEL, there is an $11 return in costs not incurred for future interventions. By aligning with the CASEL framework, TSI ensures that districts are protecting their long-term academic and financial health.

V. Recommendations

1. Own the “AI and Tech Culture” Lead
    a. Legacy players are slow; TSI is fast. We must lean into AI Literacy as our primary differentiator (Lyublinskaya, 2025). It might be prudent to consider launching a “Monthly Tech Trend” partner update to reinforce TSI’s position as the most current resource.
2. Continue to Bridge the Data to Action Gap
    a. Position TSI as the “active treatment” to Panorama’s “diagnosis”. Create a “Data-Driven Intervention Guide” for sales teams to help them articulate these edges during school presentations and impact update meetings.

3. Standardize for Scale (Internally)
    a. To make sure we can support a growing partner base efficiently and effectively, internal data management must be flawless. Implementing or auditing an existing Standard Operating Procedure (SOP) for HubSpot with regard to segments, documents, and partner data would ensure that files are accurately labeled and that our data integrity remains intact.

Annotated Bibliography

Belfield, C., Bowden, A. B., Klapp, A., Levin, H., Shand, R., & Zander, S. (2015). The economic value of social and emotional learning. *Journal of Benefit-Cost Analysis, 6*(3), 508–544. https://doi.org/10.1017/bca.2015.55

This cost-benefit analysis from Columbia University's Center for Benefit-Cost Studies in Education evaluated six evidence-based SEL programs and found an average benefit-cost ratio of 11:1—meaning every dollar invested yields an eleven-dollar return through improved educational attainment, reduced justice system involvement, and higher lifetime earnings. The study provides the primary economic justification cited in the brief's ROI argument, reinforcing that TSI's CASEL-aligned curriculum is not just pedagogically sound but financially strategic for partner districts.

Collaborative for Academic, Social, and Emotional Learning. (2022). *What does the research say?* https://casel.org/fundamentals-of-sel/what-does-the-research-say/

This resource synthesizes hundreds of independent studies showing that SEL interventions produce an 11–13 percentile-point increase in academic performance while building protective factors such as caring relationships and resilience that buffer against mental health risks. It provides the foundational, high-level justification for why an SEL-first curriculum is a sound investment for school districts seeking to improve both well-being and academic outcomes—the core value proposition underlying TSI's model.

Fisher, D. P., Brotto, G., Lim, I., & Southam, C. (2025). The impact of timely formative feedback on university student motivation. *Assessment & Evaluation in Higher Education, 50*(4), 1–10. https://doi.org/10.1080/02602938.2025.2449891

This study establishes feedback timeliness as a significant predictor of student motivation, with 57% of participants explicitly citing the content and timing of feedback as vital to their learning. The findings directly support TSI's real-time data-to-action model: when student ambassador insights translate into immediate, visible shifts in school culture, engagement increases because students perceive their input as consequential—a competitive edge over survey-based competitors whose feedback cycles are inherently delayed.

Lampropoulos, G., & Sidiropoulos, A. (2024). Impact of gamification on students' learning outcomes and academic performance: A longitudinal study comparing online, traditional, and gamified learning. *Education Sciences, 14*(4), 367. https://doi.org/10.3390/educsci14040367

This three-year longitudinal study of 1,001 students compared academic performance across online, traditional, and gamified learning environments. Gamified learning yielded markedly higher outcomes: up to a 130% increase in the excellence rate and a 25% improvement in average grades over traditional instruction. These findings provide a direct, data-backed counter-argument to the static slideshow methods used by legacy competitors, validating TSI's use of gamified, interactive modules as a pedagogically superior delivery mechanism.

Lavenda, D. A., Khalimah, A. N., & Efendi, N. (2025). Benefits and challenges of implementing Social Emotional Learning (SEL) in education: A systematic literature review. *Jurnal Dimensi Pendidikan dan Pembelajaran, 13*(2), 176–188. https://doi.org/10.24269/dpp.v13i2.11837

This systematic review examines how SEL bridges the gap between cognitive and emotional development in the digital era, emphasizing that today's students face unique stressors—including digital technology reliance and social isolation—that demand a systemic, integrated approach rather than isolated instruction. The findings support TSI's holistic ecosystem model, which embeds SEL within the context of students' actual digital lives rather than treating it as a standalone curriculum.

Lyublinskaya, I. (2025, July 10). *AI literacy is imperative for classroom success.* Teachers College, Columbia University. https://www.tc.columbia.edu/articles/2025/july/ai-literacy-is-imperative-for-classroom-success/

Lyublinskaya argues that AI literacy must be taught through a multidisciplinary lens—encompassing ethical, societal, and cultural implications—rather than as a narrow technical skill, noting that AI is projected to create 170 million new roles globally. This supports the brief's recommendation that TSI lean into AI literacy as a primary differentiator, positioning the organization in a market space where legacy competitors have been slower to adapt.

Ukgoda, H. (2025). Gamification in education: Its impact on engagement, motivation, and learning outcomes. *Journal of Educational Technology Development and Exchange, 18*(3), 41–66. https://doi.org/10.18785/jetde.1803.03

Synthesizing 41 peer-reviewed studies, this review confirms that gamification fosters intrinsically motivated engagement by incorporating game elements such as challenges, leaderboards, and collaborative tasks that encourage active participation. The findings

reinforce TSI's peer-to-peer, gamified model as the pedagogical antidote to the passive content consumption characteristic of older programs like Common Sense Media.