**RESEARCH PLAN FOR STARR OPINION RESEARCH (SOR)**
**Thought Leadership Survey of Top Executives of Civic Leadership Programs (CLPs)**
**January 1, 2016**

We are thrilled to move forward with this thought leadership research project into alumni engagement and other topics related to Civic Leadership Programs.

The following is a research plan built on the research proposal that you recently approved. This plan provides details about the research process, and is organized as follows:

- A review of the situation and challenges related to building relevant insights for the CLP community;
- Research scope and objectives;
- Agreed-upon research design;
- Our analytical approach to this project;
- Deliverables;
- Schedule;
- Budget, payment and guarantee;
- SOR's experience with civic programs, associations and other relevant credentials;

## Background for Thought Leadership Research

**Situation.** For decades, Civic Leadership Programs (CLPs) have strengthened communities. The foundation in their success is the uniquely American spirit of civic citizen-leadership. The CLPs systematically instill awareness, knowledge and relationships among talented and committed leaders in communities. We know these programs are successful, despite the absence of quantitative measurement, given their continued growth each year with new pools of graduates and continued births of new programs.

The average CLP is more than 25 years old and has more than 700 alumni – and, this grows every year! Moreover, SORs database of CLPs currently includes more than 830 programs. Using modest estimates, more than 550,000 CLP graduates are spread through the United States.

As the CLP movement continues to grow, new opportunities emerge. The is part of the natural evolution of maturing organizations. In order to leverage these exciting opportunities, individual CLPS should employ new tactics. As an example, Starr Opinion Research (SOR) believes CLPs need to develop metrics and benchmarks for the Social Activity/Capital/Capacity[i] of each CLP and identify statistically-proven actions and attitudes to influence their graduates to ultimately increase this capital. This is something that has been widely used within large public and private sector organizations as "employee engagement" – we want to bring these methods to CLPs for the benefit of local communities – and, by extension, to the county. Conservatively, what is the value of an increase of 10% -- an increase from the "lowest hanging fruit" - in the Social Activity/Capital/Capacity among these leaders?

CLPs needs quantitative measures to spur success and growth. Alternatively, without measurement, CLPs will encounter sporadic, uneven and inefficient growth with occasional failures. Since the start of the knowledge economy - driven by computing and social sciences - modern organizations in the public and private sectors have relied on measurement to guide efficient and successful outcomes.

**Challenges.** Many CLPs have historically shied away from using professional strategic research. It is likely that CLP leaders are focused on programming and tactics/execution and do not have the luxury of stepping back to take a broader perspective. Not using an outside strategist is counterintuitive given their graduates are comprised of sophisticated leaders in their respective fields, in which research-based consulting firms have a proven record as a critical investment in their success.

## Research Scope and Objectives

**Scope.** Starr Opinion Research wants to demonstrate their approach in research-based strategy and communications can guide CLPs to reap long-term gains in impact, and specifically in areas such as funding, recruitment, program awareness, focus on community needs, alumni engagement/social capital/social capacity, program growth, public awareness on key issues and the overall achievement in their missions.

SOR successfully completed pilot research for Leadership Rhode Island with surveys of their alumni. We are confident in our ability to survey CLP stakeholders and draw recommendations in the same manner as we have done for other organizations.

**Objectives.** The broad objective of this project is to demonstrate the value of strategic research for the CLP community and for individual CLPs. To accomplish this, the research will provide insights in the following sampling of areas:

- ✓ **Alumni Engagement.** What are the kinds of roles alumni play in CLPs? And, what are the kinds of activities that CLPs provide alumni? Sub-topics will touch on whether to charge dues for alumni membership programs (and, if so, how many alumni are engaged and how much are dues), ways CLPS communicate with alumni and whether CLP have staff devoted to alumni engagement. Is there a correlation between membership dues and the percentage of alumni choosing to be members?

- ✓ **Staffing.** What are current CLPs priorities? By asking about dream-scenario hiring goals, CLPs can shed light on their different challenges, ranging from needing to stabilize (needing a senior leader) to building engagement among their alumni. Are there weaknesses in their skillsets that need to be addressed?

- ✓ **Lifecycle Demographics**: Since CLPs by nature start as a small organization and grow over time, what are the similarities and differences between CLPs, with a focus on the base size of alumni, the type of structure (primarily whether affiliated with a Chamber of Commerce or an independent 501(c )3, and the age of the program.

***Note**: SOR expects that each of the topics are entry points into further examination down the road.*

## Research Design

### *METHODOLOGY*

**Sample Universe (who we are surveying).** The target audience is the senior executives of CLPs. This audience is best positioned to answer our questions about activities, strategies and policies for each CLP. The titles for the senior executives are typically Executive Director for independent CLPs, and President & CEO, Vice President and Program Director or Program Manager for CLPs affiliated with a Chamber of Commerce.

SOR has built a database of more than 830 CLPS, including the email address of the top executive. This is a reasonably comprehensive database of the universe of CLPs for this thought leadership research. The database was built through exhaustive online searches including a review of lists of IRS 501(c )3s and census lists of state, metropolitan areas and counties.

**Mode.** We will conduct the survey online. There are tremendous advantages to conducting this survey online. Since we have a comprehensive database of the universe, and all programs have a working email address, we can reach out equally to all potential respondents. **This mode (method of conducting the survey) follows rigorous methodological principles of random survey sampling by offering everyone an equal opportunity to participate.** By emailing the invitations, we can attract broader participation because potential respondents can reply at their most convenient time and place. Moreover, the data collection costs are significantly reduced compared to a telephone or paper and pencil survey.

**Sample Size and Estimated Error.** Based on similar projects, we anticipate achieving 100 to 200 responses. This would provide a margin of sample error between ±9.2 and ±6.0 percentage points at the 95% confidence interval. If we were to conduct the same survey 100 times, we expect that in 95 of those surveys the responses would fall somewhere within our margin of sampling error. The margin of error will be larger among subgroups of respondents.

Our ability to conduct a deeper analysis - comparing subgroups of executives or CLPs - is restricted by the small sample size. The primary reason is we are unable to compute whether differences are statistically-significant when a subgroup has fewer than 30 respondents. We anticipate we will only be able to compare two, possibly three subgroups, within a category. We typically only report differences between subgroups when they are statistically significant; however, using our judgment, we may discuss differences that are directional, though not computed as statistically significant at the 95% confidence interval.

**Recruitment Techniques.** We will send invitations to participate in emails sent directly from the president of Starr Opinion Research. Each email will contain a link with a unique password, so the link can only be used by one respondent. By clicking on the link, the respondent's Internet browser will go to a survey on a secure website. The unique password allows us to determine which respondents have not yet participated, partially completed a survey or fully completed a survey.

The password also allows us to append data to the survey; for example, we can attach the location and age of the program – information maintained in the CLP database – to a survey response. The password-enabled link also allows respondents to start a survey, pause, and easily return to the survey later – picking up at the same point.  Responses are stored on our server once they are entered, not at the completion of the survey.

Invitations will emphasize that all responses, including whether a person has completed a survey, is confidential.  All data is reported in the aggregate, and we ensure that no respondent is identifiable from the reported results.

In addition, invitations will emphasize the survey is short, contains topics that are important or of interest to them and SOR – an independent research firm - is the sponsor.

As an incentive to participate, SOR will offer to send an advanced copy of the detailed memo to all respondents.

All invitations include an option for an invitee to opt out of future survey invitations.  The names of those who opt out are retained in the CLP database.

We believe this is an appropriate incentive for this audience.  Another option we rejected was making a financial contribution to a charity based on the number of respondents. Offering a direct incentive to each respondent might lead to a lower response rate or unnecessarily add costs to future surveys.

For this project, we anticipate issuing three invitations to each potential respondent.  The first email will be an initial invitation; a second will be a reminder (probably one week after the initial invitation) and a third will be a reminder that the survey will be wrapping up in a few days.  Given their busy workday, most executives who take a survey will do so within 24 hours of a receiving an invitation; ideal times and days for invitations are Monday (most ideal), Wednesday and Friday.  To provide a breadth of equal opportunities to participate, we send invitations at different times and days.  If a respondent completes the survey, or opts-out, they will not receive any more invitations.

For this project, we will not send an e-mail (a pre-invitation) from a trusted source to encourage participation.  However, this is something we would probably do when surveying graduates or alumni of a CLP.

## *DATA COLLECTION*

**Programming and Internal Pre-Testing.** Once you have approved the questionnaire, we will program the survey to be completed online – using any browser, whether on a desktop computer, tablet or smartphone.  We rigorously pre-test test the survey internally, with people not working on this project, for clarity and to estimate the actual length of time to take the survey.  We thoroughly test the survey to ensure everything follows the questionnaire, including rotations, skip patterns, A-B testing, visuals and other question instructions.  In addition, we check that instructions are clear, efficient and unbiased and answer choices are appropriate.  Once we complete internal pre-testing, you are invited to test the survey, too.  We will move forward with data collection upon your approval.

**Field Management.** We typically start fielding the survey slowly, with fewer than 100 potential respondents. This form of field-testing provides us an opportunity to ensure data is being recorded properly and another opportunity to ensure the questions are yielding clear and reliable responses.

At *all* points of the process, the contact information in the CLP database remains confidential.

As data is collected, we carefully review the initial data for any problems, such as incorrect base sizes and unexpected distributions of responses (including too numerous “don’t know” responses). We actively investigate and resolve unexpected results.

### Data Processing and Open-End Coding

Once data is collected, we process the responses through a computer tabulation program. Our first step is to review the data and validate that it matches up properly with the questionnaire and remove duplicative data or responses that are clearly unusable (such as someone who clicked the same response to every question).

We then use the tabulation program to calculate the overall or topline results for each question.

At this stage, the analyst will identify additional tabulations needed, based on the results. Examples might include creating categories, time series, indexes and statistical tests. The primary analytical tool is cross-tabulations, in which results are tabulated for a series of subgroups and we can identify key trends and provide detailed profiles of each subgroup’s results. The tabulation program will compute statistical comparisons – t-tests, chi squares and difference between proportions – to determine if differences between subgroups are statistically significant. Analysts may look for statistically significant differences at the 99%, 95%, 90% and possibly 85% confidence intervals. The industry standard is to report differences at the 95% confidence interval.

In some projects, the analyst may deploy multivariate statistical modeling such as multiple regression, logistic regression, CHAID, factor, cluster, and discriminant analysis. For A-B tests, in which respondents are randomly assigned to answer variations of questions, analysts ensure the two random populations are equivalent.

For open-ended questions, we review the responses to create a code book, or categories, summarizing the key points in the responses. We review each question and assign one or more codes to each response. For example, a response to a question about “what are reasons you like The New York Times” might include a comment about accuracy of reporting as well as in-depth reporting (two codes). The coded responses are then added to the data set, allowing us to tabulate the results to open-ended questions. When appropriate, the data team will review and clean up verbatim responses to these questions (fix spelling and capitalization errors) and include them in the report.

## Our Analytical Approach to this Project

### *OVERALL*

We have several underlying principles in our approach to *all* projects:

**Custom.** We have proven approaches and analytical tools for categories of research – such as branding, message development, measuring impact, product development, and pricing. **However, in the end, each project requires a thoughtful and adaptive approach. We are not satisfied until we thoroughly understand the inner decision-making thoughts of our audiences.**

**Change.** What is common to all of our projects is the ultimate desire to affect change. The foundation of our approach is a continuum that begins with **awareness**, initially colored by existing **attitudes or perceptions and knowledge**, is checked for alignment with **values and beliefs** and ultimately leads to **decisions and actions** (behaviors).

**Goal-oriented.** The underlying foundation of all **strategic analysis** is knowing what you want to change, and subsequently identify secondary measures that ultimately influence that change. This focus drives our guidance for **actionable recommendations** and allows you to use your resources more efficiently and with the greatest impact. Moreover, this also forces us to explain to you what the results mean, vis-à-vis reaching your goals.

These are some of the primary approaches in our analytical toolbox:

- **Big picture:** Before delving into the details, we need to look at the broader environment and the scale of the problem.
- **Know your audiences:** We comprehensively describe your target audiences, through their awareness, attitudes, beliefs, behaviors and demographics.
- **Descriptive statistics:** For many questions, we rank order responses, calculate averages of scales and aggregate responses.
- **Identify gaps**: Where does performance meet and/or fall short of stated expectations? Which attributes are perceived important and impact behavior? Is there a difference between how people perceive themselves and how others perceive them? Similarly, is there a difference between what one group thinks is important compared to another groups? Analysis might include a quadrant analysis, in which we typically categorize activities based on their perceived relevance and perceptions. Another way we analyze gaps, or differences, is in "experimental design" or "A-B" testing, in which we can guide you to the best decisions.
- **Identify drivers**: Statistically, which attributes best predict attitudes and behaviors?
- **Identify segments and differences between them:** Create logical subgroups based on attitudes, behaviors (possibly creating an index or statistically-driven "clusters") or demographics, and identify resulting statistically significant differences between them in how they feel, act or react.
- **Track changes over time:** Using evaluation criteria that are realistic and appropriate, what are changes in awareness, opinions or behaviors, and what is the basis for these changes?

### *FOR THIS PROJECT*

We understand the challenges in pulling together a successful thought leadership research project. In order for your communications to break through among people who already work in this space, you need to develop insights that are **unique**, **thoughtful, relevant** and **breaks new ground**, yet can be explained and ultimately make sense. Furthermore, the results need to respect the experience and passion of senior leaders working in non-profit environments. The results need to add to discussions about the CLP arena in general, but ultimately must provide useful perspectives for the individual CLP and its senior staff.

Given the limited size and scope of this project, we anticipate working mainly with behavioral and demographic data.

To build something that is unique, relevant and breaks new ground, we will likely create an index based on alumni activities. This will allow us to place each CLP into a classification, such as "high/medium or low level of alumni activity." We would demonstrate there is a correlation between the index and some outcome – such as level of employee engagement or impact in the community. We would also look for additional statistically-significant demographic differences between these three groups to possibly explain why some CLPS are achieving higher results. Some might call this a-priori or hypothesis-driven categorical analysis.

For a practical benefit, we will also apply the index to the amount of cash flow CLPs are able to generate from their alumni membership dues as well as the staff functions they want to hire.

A hypothesis about asking about their next "dream" hire is it should allow us to estimate the CLPs strategic situation – are they trying to stabilize (i.e. need core leadership or low-level assistance), in early stage of growth (i.e. need to raise money or develop good programming) or maturing into a larger, more impactful CLP (may need more financial help, communications or alumni-specific help)?

We expect the question related to whether CLPs have held special programming related to law enforcement and underprivileged communities will also expose differences between CLPs. What are the differences between groups that have and have not had these types of programs? What do we learn from these differences? Assuming this is a desirable topic for CLP graduates to address, can we demonstrate an insight that will help other CLPs add this type of program?

Our analysis will include cross-tabular comparison by geography (census region), age, population density, type of area served, type of structure (i.e. Chamber of Commerce, 501(c )3,), and size of population served, to identify key trends and provide detailed profiles of each subgroup's results.

At the conclusion of this research, SOR will possess insights to share and spur on conversations. It will demonstrate the importance and value of studying CLPs. While they are not a client, we would expect the Association of Leadership Programs, of whom you are an associate member, to use this research in marketing to new members and develop relevant programming and materials for existing members.

From the data, you will also have some benchmarks that we can re-visit in the future.

**<u>A Possible Research-Based Narrative</u>**

**So, for a typical target of this thought leadership – an Executive Director of a 510(c)3 or a President & CEO of a Chamber of Commerce-based CLP, with 27 years of experience and 750 alumni – what will be <u>unique</u>, <u>thoughtful</u>, <u>relevant</u> and <u>breaks new ground</u> – and <u>actionable</u>?**

1. POSSIBLE HEADLINE: Study Shows Tremendous Upside in Alumni Engagement.

2. Rising numbers of alumni are pushing CLPs to expand their offerings. The Proof: Number of alumni activities (the index) is correlated to number of alumni (though not by number of years); who CLPs want to hire next.

3. There is an index so the target audiences can identify in which category their CLP falls and where they are relative to others in their category in terms of alumni activities, the type of staff they want and whether they offered programming on law enforcement and underprivileged communities.

4. Strategically, where is the target's CLP in their lifecycle, and what type of hiring and alumni programming should they be doing.

5. Similarly, what are recommendations on charging membership dues and a target level of engagement?

6. What, if any, differences exist in terms of impact between CLPs that are independent or part of a Chamber? What are their respective strengths and weaknesses?

7. Bottom line: the long-term value for CLPs is in continual engagement of alumni. Otherwise, you leave too much value on the table. This is low hanging fruit.

Possible Takeaways: Engagement costs money, especially in the initial stages. So, CLPs need to spend time and money efficiently and strategically. Though SOR has some theories, it is time to do some research to identify best practices broadly, and then refine at the local level. It is an investment that will pay off handsomely for the CLP and the communities.

It is hard for a small program to offer the same range of activities of a larger program. Can they achieve the same results, at a lower cost, as the mature CLPs?

***SURVEY INSTRUMENT***

**QUESTIONNAIRE**

SOR believes in a collaborative approach to research. We would draft the initial questionnaire and then work with you to make changes until we are all satisfied that it will achieve your objectives. Our questions are based on the goals of the survey, the analytical tools to be used, the nature of the audience, the type of data we are collecting and the way in which we are collecting it. We carefully craft questionnaires for clarity and to avoid question order affects and consistency in scales and response categories.

**Length:** The survey will include five to ten questions. This length is short enough to encourage participation, yet long enough to cover our research objectives. Since we are using pre-screened email addresses of senior executives, we will not use screening questions in this survey. We will also minimize the number of demographic questions; instead, we will append region, population density, type of ownership structure, age of CLP and type of geographic area served from the CLP database.

**Structure:** To keep the survey short and cost-effective, the survey will use close ended questions – with an exception for a final question to allow respondents to add a comment on any topic. This approach is acceptable for an initial thought leadership project; however, in the future, we would expect to conduct some qualitative research or include some open-ended questions to allow us to better explain the "why" to attitudes and behaviors. Close-ended questions typically utilizing a variety of four- and five-point scales, multiple choice and rating/ranking approaches.

**Content:**

- ✓ **Alumni Engagement.** To efficiently acquire behavioral data, we will ask a multiple choice question asking whether their CLP does specific activities in the areas of staffing, having alumni programming/charging dues, types of programming, roles of alumni in managing the CLP and communications.

  For CLPs that charge alumni membership dues, we will ask the cost of the dues and the percentage of alumni that pay dues.

- ✓ **Challenging Topics**. Has the CLP held programming for alumni about law enforcement and underprivileged communities?

- ✓ **Staffing.** To avoid getting bogged down in whether a CLP has sufficient revenue to justify hiring, we will ask respondents what function they would hire next if budget was not an issue.

- ✓ **Demographics**: We will ask how many alumni the CLP has, given this is data not typically available from a web site. All other demographic data can be acquired through web site research.

**Cognitive Pre-Testing.** When appropriate, especially when delving into groundbreaking areas, we pre-test questionnaires using a cognitive interviewing process. For this test, we recruit respondents from our target audience to interpret for they perceive all questions and answer choices. This process ensures the survey is fielded smoothly and delivers valid data. We will not conduct cognitive pre-testing for this project.

## Deliverables

The research process is guided by our completing the following deliverables:

- ➢ **Research Plan:** This document. All research should include the research objectives and a plan for achieving them.
- ➢ **Questionnaire:** SOR typically drafts the survey instrument and collaborates with the client to the point where everyone agrees it will cover all of the research objectives.
- ➢ **Topline Results:** An easy-to-read summary of the overall results of the survey.
- ➢ **Crosstabs (upon request):** Results for each question are broken down by different subgroups and analyzed statistically for possible differences between subgroups.
- ➢ **Detailed Memo:** Our capstone deliverable starts with an executive summary followed by an explanation of the methodology, a review of the objectives, a summary of insights and implications and a detailed review in a bulleted narrative of the analysis including charts, graphs and tables.
- ➢ **Briefing:** We present the results and implications over the phone or in person with staff and other stakeholders (client is responsible for travel costs).

Examples of these deliverables are available on our website, www.starr-research.com.

We provide reasonable **follow-up interpretation and analysis** and **consultation** at no charge. This includes help with **implementation** and **reviewing communications** – such as advertisements, speeches, brochures – to ensure they accurately describe the research and follow the insights from the research.

For an additional charge, we can develop and deliver a **slide presentation**, which some CLPs distribute among funders and alumni, and possibly post on their web site.

In addition, we can provide qualitative research, such as focus groups and in-depth interviews. We typically use **qualitative research** to probe deeper into issues and uncover knowledge, perceptions and assumptions and explanations for attitudes and behaviors. It is also a way to develop and refine hypotheses for ways to change attitudes and behaviors.

- **Focus groups** are normally conducted in person and can spark new approaches. We often use focus groups to test specific communications, whether messages or information, or products, and better understand the attitudes behind reactions.

- **In-depth interviews** are typically conducted with elite audiences by telephone at pre-scheduled times and provides experts more time to talk than in a focus group.

Qualitative research may be conducted in preparation for quantitative surveys, to develop hypotheses to later quantify; they may also be used after a survey to explain unanticipated results in survey data. We also offer **follow-up interviews** with respondents when we need further explanations.

Our analysis from focus groups and in-depth interviews are *descriptive*. The process helps us understand people's ideas and concerns, and help us assess whether ideas are likely to be believable, persuasive (relevant, unique) and clear. In general, they help us answer questions starting with "what" and "why."

## Schedule

**Timeline:** Below is the project schedule based on our agreed upon proposal. During the course of the project we will communicate any proposed changes as requested by us or you:

| Research Process | Business Days | Due Date (2016) |
|---|---|---|
| Delivery of research plan | 1 | Friday, January 1 |
| SOR delivers draft questionnaire | 3 | Wednesday, January 6 |
| Client reviews questionnaire, SOR available for call to discuss, client send comments to SOR | 3 | Friday, January 8 |
| SOR edits questionnaire, back-and-forth with client to point of agreement and sign-off with client | 1 | Monday, January 11 |
| Client send CLP database | N/A | Monday, January 11 |
| SOR programs and tests survey | 2 | Tuesday, January 12 |
| SOR fields survey | 24 days | Wednesday, January 13 to Friday, February 5 |
| SOR processes results | 3 | Wednesday, February 10 |
| SOR delivers topline results and cross-tabulations | 1 | Thursday, February 11 |
| SOR delivers detailed memo | 5 | Thursday, February 18 |

## Budget and Payment

**Budget:** Fees are a fixed amount, based on our best estimate of the time and type of staff required to complete this work and associated costs. The budget is based on the assumptions and deliverables outlined in this research plan, and includes:

- ✓ On the management and analysis side, all professional time related to the development, oversight, analysis and presentation of the results; and,
- ✓ On the data collection side, the professional time related to the cost of programming, hosting, data processing, coding and tabulation for the survey.

Travel or other out-of-pocket expenses would be billed at cost and subject to advance approval.

Please note that changes in the methodology, such as the make-up of the respondents, the number of questions or recruitment procedures, may impact the cost of the research.

For other survey projects, the key elements of estimating data collection costs are the mode (i.e. online, phone, mail), number of interviews, length of interviews and the difficulty of reaching the sample (i.e. executives are more expensive to reach than voters). To encourage participation with harder-to-reach audiences, we may include an added cost of financial incentives.

**Payment:** For our first project, we will invoice you 50% of the costs at the start of the project, which must be paid upon receipt and before work can begin. The balance will be invoiced upon delivery of the detailed memo, and payment will be due within 15 days.

**Ongoing Consultation:** As noted earlier, we provide reasonable follow-up interpretation and analysis and consultation at no charge.

**Marketing:** Once the project is complete and we have received full payment, you agree that SOR may reasonably use your company's name and logo in our marketing materials, including our website. In addition, you permit us to share a short case study of the project (overview of the situation, objectives, research design and general outcomes), without sharing proprietary details. Please inform us *before* we begin if we will need to shield your name or if you do not provide permission to share this project at all.

**Satisfaction Guarantee:** We guarantee that you will be satisfied by our work. If at any time you are not satisfied with the progress and quality of our work, contact us immediately and we will discuss the issues with you as well as respond within 24 hours in writing with a plan to make you satisfied. If you wish to terminate a project, send us a communication in writing and we will relieve you of further obligations; at that time, we will stop work on the project and calculate costs to that point and return any overpayment or invoice any expenses due.

**Contact**: Contact us with any questions or comments at jstarr@starr-research.com or (202) 494-1141.

## About Starr Opinion Research

**Who we are:** Starr Opinion Research guides organizations through marketing, communications, and public affairs challenges.

We conduct primary research (surveys and focus groups) to assess critical elements necessary to create a plan of action – often to influence awareness, knowledge and behaviors.  Our services are crucial for organizations motivated to deliver the most impact.

As a small firm, all work is directed personally by the principal, Joshua Starr.  Mr. Starr is a long-time strategist and communications specialist with expertise in opinion research.

SOR is exceptionally qualified to conduct strategic research and provide guidance for civic leadership programs because we are:

- **A HIGH VALUE, PROVEN INVESTMENT:** It's a no-brainer from a cost-benefit analysis that our actionable recommendations pay off.  For civic leadership programs this means increasing social capacity or capital well beyond our costs. We have a track record of successfully working with well-known public issue campaigns, associations, non-profits, and corporations;

- **ACTIVE THOUGHT LEADERS:** Our fingers are on the pulse of civic leadership programs from a national and local perspective, and **we readily share our thoughts** on our website, blog and research reports;

- **STRATEGIC:** We have a strategic perspective and the necessary expertise in communications, engagement, policy and measurement to raise your impact – while staying true to your existing program and values;

- **INNOVATIVE:** We meet new challenges by developing fresh ways to collect and analyze data. This stems from our political roots, where, for example, we developed rapid ad testing and psychodemographic voter profiles that campaigns still consider "innovative" 20 years later.  We have solved some of the most complex public policy and communication challenges;

- **COLLABORATIVE AND FLEXIBLE:**  We work with you.  This means we incorporate your unique culture and values, identify the right fit of strategic and actionable paths for your organization and work patiently with stakeholders until everyone is on board.   We enjoy explaining what we do, how we do it and why it works;

- **INDEPENDENT:** As a non-partisan, third party, methodologically rigorous partner, we have more credibility with your stakeholders and respondents.  This allows us to delve deeper into your challenges;

- **COMITTED, LEAN, SOCIAL ENTREPRENEURS:** Like you, we want to improve communities now and for future generations. We believe the same instruments we provide multinational corporations should be available to our community leaders. We know how to **maximize scarce research dollars**, and find creative ways to balance tight budgets while reaching your objectives;

- **EXPERTS IN THE TECHNICAL ASPECTS:** We apply methodologically rigorous research standards and subscribe to the professional standards of AAPOR. Our interviews are strictly confidential. For each project we develop a **research proposal/plan** with objectives, methodology, timeline, deliverables and costs. The **survey process** includes drafting the questionnaire, preparing lists of potential respondents, programming and deploying the survey, monitoring responses, tabulating the data and coding open-ended responses. We **deliver** an easy-to-read topline summary, detailed memoranda, slide presentations and news releases. We are well-respected focus group practitioners, where we gain a deeper understanding of assumptions and behaviors and develop hypotheses on ways to influence them.

In addition, we have worked in diverse areas such as public affairs, membership/employee/voter engagements, messaging and reputation research, all areas with a relationship to civic leadership programs:

- For **Leadership Rhode Island**, SOR conducted pilot studies of their alumni. In 2015, a survey was the focal point of a front-page newspaper article that reinforced their profile as non-partisan community leader. The study also helped with measuring and improving internal communication and engagement efforts;

- The foundation of Joshua Star's work is his experience polling for **President Bill Clinton** and the **Democratic National Committee** on numerous public issues. Although he is now a **non-partisan** pollster, he worked on some of the most challenging issues in the state, national and international arenas, including the 1996 re-election campaign and policies related to crime, education, trade, agriculture, federal governance, economic development and jobs, technology, medical insurance, military policy, environment and foreign relations.

- With Joel Benenson, currently the pollster for Hillary Clinton and former chief pollster for President Barack Obama and a teammate on the 1996 Clinton-Gore re-election effort, Josh worked closely with **Procter & Gamble** on a presidential-style campaign focused on employee engagement and strategic internal messaging for their CEO.

- For a series of non-profit membership associations, Joshua Starr has provided guidance in areas such as public affairs, thought leadership, program communications tracking, message development, strategic positioning, program development; clients included the American Library Association, U.S. Chamber of Commerce, Entertainment Software Association, Society of Actuaries, American College of Radiologists, Armed Forces Relief Trust, CTIA, and American Motorcycle Association.

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**Joshua Starr** is a strategist and communications specialist with expertise in opinion research. He has counseled political campaigns, national not-for-profits, and corporations since 1994.

Josh received his initial training working with the leading pollsters for President Barack Obama, President Bill Clinton and former Secretary of State Hillary Clinton. During the 1996 presidential campaign, he collaborated on many research innovations including the incorporation of mapping technologies, rapid testing of attack-and-response advertising, and microtargeting.

In addition to conducting surveys, Josh frequently moderates focus groups and conducts in-depth interviews.

Josh directed research at KRC Research, a non-partisan subsidiary of Interpublic and closely affiliated with the global public relations firms Weber Shandwick and GolinHarris. At KRC, he provided a full range of strategic communications research services for organizations facing complex challenges. He frequently conducted research for landscape assessments; message development; reputation, issue and crisis management; and, publicly released polling to generate news and demonstrate leadership in an industry.

In addition to his work with political candidates, some of the organizations Josh has helped include American Airlines, Armed Forces Relief Trust, AOL, Capgemini, Entertainment Software Association, Honeywell, Johnson & Johnson, Kraft, Micron, Microsoft, National Pork Board, Northrop Grumman, Nuveen Investments, Pfizer, PhRMA, Procter & Gamble, Radio City Entertainment, Society of Actuaries, and Toyota.

Josh founded Starr Opinion Research in 2009. He graduated from the University of Pennsylvania with a bachelor's degree in Anthropology, and is a member of the American Association for Public Opinion Research (AAPOR) and Association of Leadership Programs (ALP). Josh has worked as a political campaign manager, journalist, archaeologist and educator; he trained as a DC Teaching Fellow, and is a licensed tour guide in Washington, DC. He was also involved in managing the technology in his family's fourth-generation small manufacturing business.

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[i] For the purposes of our work, we use the following definitions:

**Social Activity:** The individual social relationships between members of a community. Also may be called **Social Interactions** and **Social Networks**. The aggregate of Social Activity/Interactions/Networks is Social Capital.

**Social Capital**: The combined power of the Social Activity/Interactions in a community, including the combined power of individuals, networks and institutions (all institutions, ranging from commercial, governmental, civil society, educational and religious). In a world that depends less on existing natural resources, Social Capital is increasingly acknowledged as a determinant of sustainable economic prosperity and social well-being.

**Social Capacity:** The community's outer boundaries, based on the underlying culture, of maximum Social Capital. Through cultural changes, a community can increase the Social Capacity, and, by extension, its Social Capital. Positive examples of cultural change might include trust and inclusiveness. Also may be called **Social Potential.**