

The Constructive Dialogue Institute Strategic Plan

FY22-24



Table of Contents

Page 3	Who We Are
Page 4	Executive Summary
Page 6	Our Deepening Divide
Page 7	When Divisions Enter the Classroom
Page 8	Reason for Hope
Page 10	The Role of Education
Page 11	Our Mission, Vision, and Theory of Change
Page 12	What the Constructive Dialogue Institute Has Achieved
Page 17	Strategic Plan FY22-24
Page 29	Financials
Page 33	Citations



Who We Are

ABOUT US

The Constructive Dialogue Institute (CDI), formerly known as OpenMind, is a non-profit organization founded by Jonathan Haidt and Caroline Mehl in 2017 to combat polarization and social division. CDI is dedicated to equipping the next generation of Americans with the mindset and skill set to engage in dialogue across differences.

We seek to help teachers, faculty, and administrators build learning environments that enable students to feel comfortable engaging with challenging topics so that real learning can occur. We do so by translating the latest behavioral science research into educational resources and teaching strategies that are evidence-based, practical, and scalable.



Perspectives

PERSPECTIVES: AN EVIDENCE-BASED ONLINE LEARNING PROGRAM

The main tool we developed to spread the practices of constructive dialogue is an online learning program called Perspectives. In the program, students explore the inner workings of the mind and gain insights to better understand themselves and others. Students also develop a robust toolkit of science-based practices to challenge cognitive biases, engage in nuanced thinking, and communicate more effectively with others about sensitive and divisive topics.

OUR ACCOMPLISHMENTS

In the past five years, we've reached more than 50,000 learners across more than 900 academic institutions in 48 states. Research demonstrates that our online learning program, Perspectives, is effective in reducing hostility across differences and dichotomous thinking and increasing a range of positive outcomes, including intellectual humility, growth mindset, perspective-taking.

Executive Summary

THE POLARIZATION CHALLENGE

Deepening distrust and division within American society are threatening to tear our country apart. Cross-partisan polarization is at an all-time high, and a growing number of Americans have lost faith in U.S. democracy.

Our educational institutions play a vital role in preparing students for democratic citizenship, yet many are failing to live up to this responsibility.



THE FIVE PILLARS OF CDI'S STRATEGIC PLAN

Over the next three years, CDI is embarking on an ambitious journey to prepare the the next generation for democratic citizenship by spreading the practices of constructive dialogue across our nation's secondary and post-secondary education systems. We will pursue this work through five key pillars:



1. Expanding our suite of educational tools. CDI will focus primarily on helping the next generation gain the mindset skill to engage in constructive dialogue across differences. We will do so by expanding our suite of evidence-based tools to support teachers, professors, and students in high schools, colleges, and universities across the country.



2. Scaling our educational tools to 1 million learners. CDI will pursue three main strategies to begin reaching 1 million college and high school students annually by 2025.

- **Distribution partnerships:** We will develop partnerships with schools, districts, EdTech platforms, and large associations to spread our tools through their established networks.
- **Thought leadership:** We will pursue active thought leadership work to raise awareness about CDI and our educational offerings.
- **Direct-to-educators:** We will leverage CDI Educator Ambassadors to serve as champions for our work and engage in direct-to-educator outreach to spread our educational tools.



3. Establishing the importance of constructive dialogue to educational outcomes. CDI will actively engage in thought leadership work to make the case for the critical role constructive dialogue plays in education. This will include conducting original research to establish the link between constructive dialogue and educational and civic outcomes, and traditional thought leadership strategies such as white papers, op-ed, and media appearances.



4. Delivering turnkey solutions to workplaces. Over the past three years, CDI has experienced inbound interest from workplaces in the private, non-profit, and public sectors. We will develop more turnkey solutions to serve these partners, with the goal of generating 25% of our total operating expenses through this work. This earned revenue will support our work with educational institutions and lessen our reliance on philanthropic support.



5. Building the organizational infrastructure to achieve our goals. CDI will continue to invest in building a strong organization. This will include expanding our team and board and pursuing a sustainable revenue strategy, with 35% of our revenue generated through earned revenue.



Our Deepening Divide

OUR TRIBAL POLITICS

Over the past few decades, our divisions across race, religion, class, culture, and geography have fused with our political identities.¹ While in the past political parties represented heterogeneous groups where people found common cause with one another within and across party lines, this stacking of identities has resulted in Americans seeing themselves as belonging to distinct tribes locked in a zero-sum battle for the fate of our country's future.

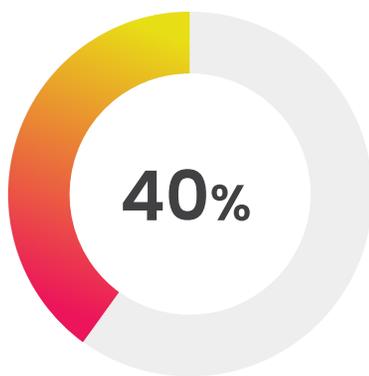
Deepening distrust and division within American society are threatening to tear our country apart.

THE ROLE OF TECHNOLOGY AND MEDIA

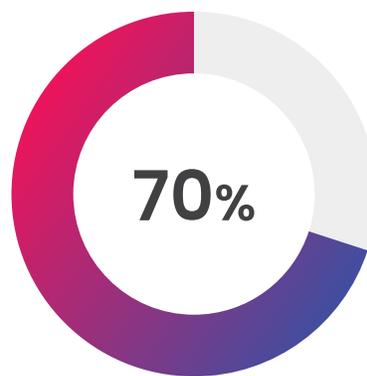
These trends have been amplified by rapid changes in technology and our media ecosystem. The surge in hyper-partisan news and misinformation paired with outrage-optimizing social media algorithms has resulted in Americans living in alternative epistemic realities, where there is no longer agreement on basic facts.

THE RESULT

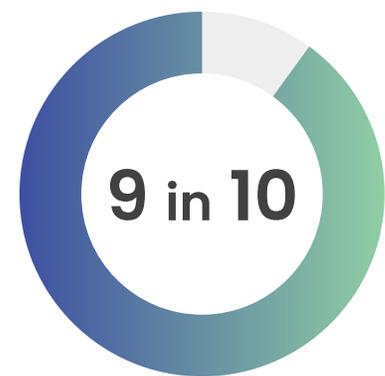
The combination of rising intergroup antipathy and a lack of shared reality poses an enormous threat to our democracy.



of Americans reported that they had lost faith in U.S. democracy



of Americans believe America is in crisis and at risk of failing



Biden and Trump voters view politicians of the opposing party as a clear and present danger

Sources: Nathaniel Persily and Jon Cohen, "Americans Are Losing Faith in Democracy—And in Each Other," Washington Post, 14 October 2016 and "America is exceptional in the nature of its political divide," Pew Research Center, 2020 and NPR/Ipsos poll, 2022.

When Divisions Enter the Classroom

The breakdown in civil society is having a profound impact on educational systems and young Americans.

LACK OF ADEQUATE CIVIC EDUCATION

Young Americans are not gaining the knowledge, skills, and dispositions needed to sustain a democracy. According to a 2019 report by Red & Blue Works, 85% of K-12 students receive only 1 semester of civics education over their 13 years of schooling.²

EROSION IN SUPPORT FOR HIGHER EDUCATION

A 2019 Pew survey found that only 50% of Americans think colleges and universities have a positive impact on how things are going in the country.³ Experts theorize that this negative view has been caused, in part, by an increase in “culture war” issues playing out on campuses across the country.

RISE IN CENSORSHIP

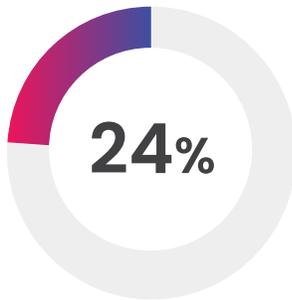
At a time when Americans are grappling with racial tensions and competing visions of our future, education and dialogue about these issues are more vital than ever. Unfortunately, according to PEN America, in 2021, legislatures in at least 24 states introduced bills banning the teaching of “divisive” concepts, primarily relating to race, gender, and American history.⁴



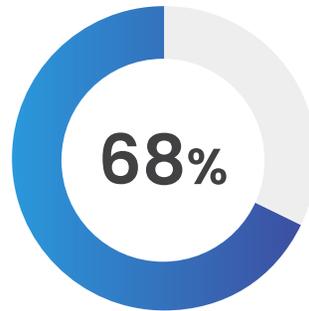
SPIKE IN THREATS OF VIOLENCE

Perhaps of greatest concern, vehement disagreements over school decisions have led to a dramatic increase in harassment and threats of violence against school board members and administrators, leading the Justice Department to take action.⁵

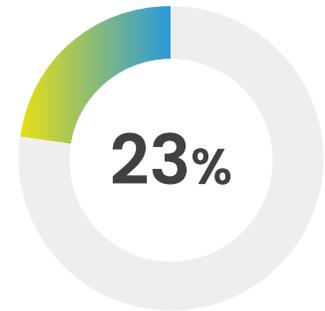
THE IMPACT ON YOUNG AMERICANS



of American Millennials believe democracy is a “bad” political system, compared to only 16% of youth a decade earlier



of college students say their campus climate prevents them from expressing their true opinions

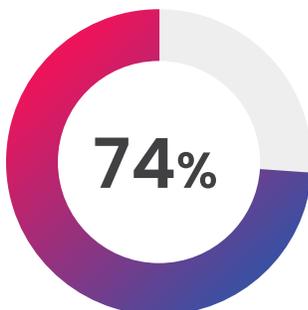


of college students would not be friends with someone who voted for the opposing presidential candidate

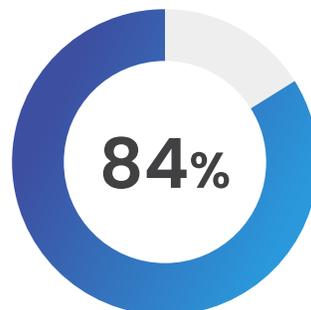
Sources: Foa, R. S., & Mounk, Y. “The Democratic Disconnect,” *Journal of Democracy*, vol. 27, no. 3, 2016, “First Amendment vitals: Taking Gen Z’s pulse on free expression and inclusion, Knight Foundation, 2019 and Generation Lab/Axios Polling, 2021.

Reason for Hope

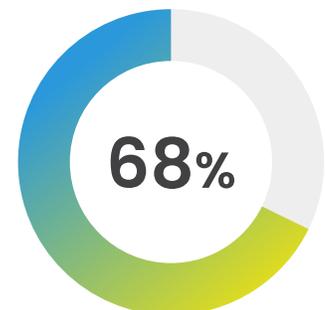
Despite these worrisome trends, there is reason for hope.



of Americans prefer that politicians compromise in order to find solutions



of American believe we should teach American history that includes “our best achievements and our worst mistakes”



of Americans agree “It is still possible for the U.S. to achieve the ideal of our national motto ‘E Pluribus Unum’: ‘From many people, one.’”

Sources: “Competing Visions of America,” PRRI, 2021.

FOUR PILLARS OF A STRONG DEMOCRACY

In recent years, there have been increased efforts to protect our democracy. These efforts typically fall across four key pillars, aiming to strengthen: (1) elections and voting, (2) democratic institutions, (3) information ecosystems, and (4) civic culture.

LEVERS

SUB-LEVERS



Elections & voting

- Increase voting access
- Replace voting systems with systems like ranked-choice voting
- Campaign finance reform



Democratic institutions

- Strengthen governing institutions to reduce government dysfunction and gridlock, ensure representation of the people, and maintain checks and balances



Information ecosystem

- Support trustworthy news and freedom of the press
- Create digital spaces that advance democracy, not hate



Civic culture

- Informed and engaged citizenry
- Shared sense-making
- Healthy discourse
- Social cohesion

While great strides have been made in the field of democracy reform, strengthening our civic culture has been neglected compared to other strategies. We believe this is a mistake, as a healthy civic culture serves as the foundation of a strong democracy. As John Dewey noted, "Democracy is a way of life controlled by a working faith in the possibilities of human nature... This faith may be enacted in statutes, but it is only on paper unless it is put in force in the attitudes which human beings display to one another in all the incidents and relations of daily life."⁶

The Role of Education

FROM GENERATION TO GENERATION

Democracy is not intuitive, inevitable, or permanent. Each generation must endow the next with the knowledge, skills, and dispositions to build a strong civic culture if we hope to sustain a thriving, pluralistic democracy. Our education system plays a vital role in imparting this generational responsibility. In addition to understanding the mechanics of how our democracy functions, students must learn to critically evaluate information, discuss contentious issues, and recognize our shared humanity.

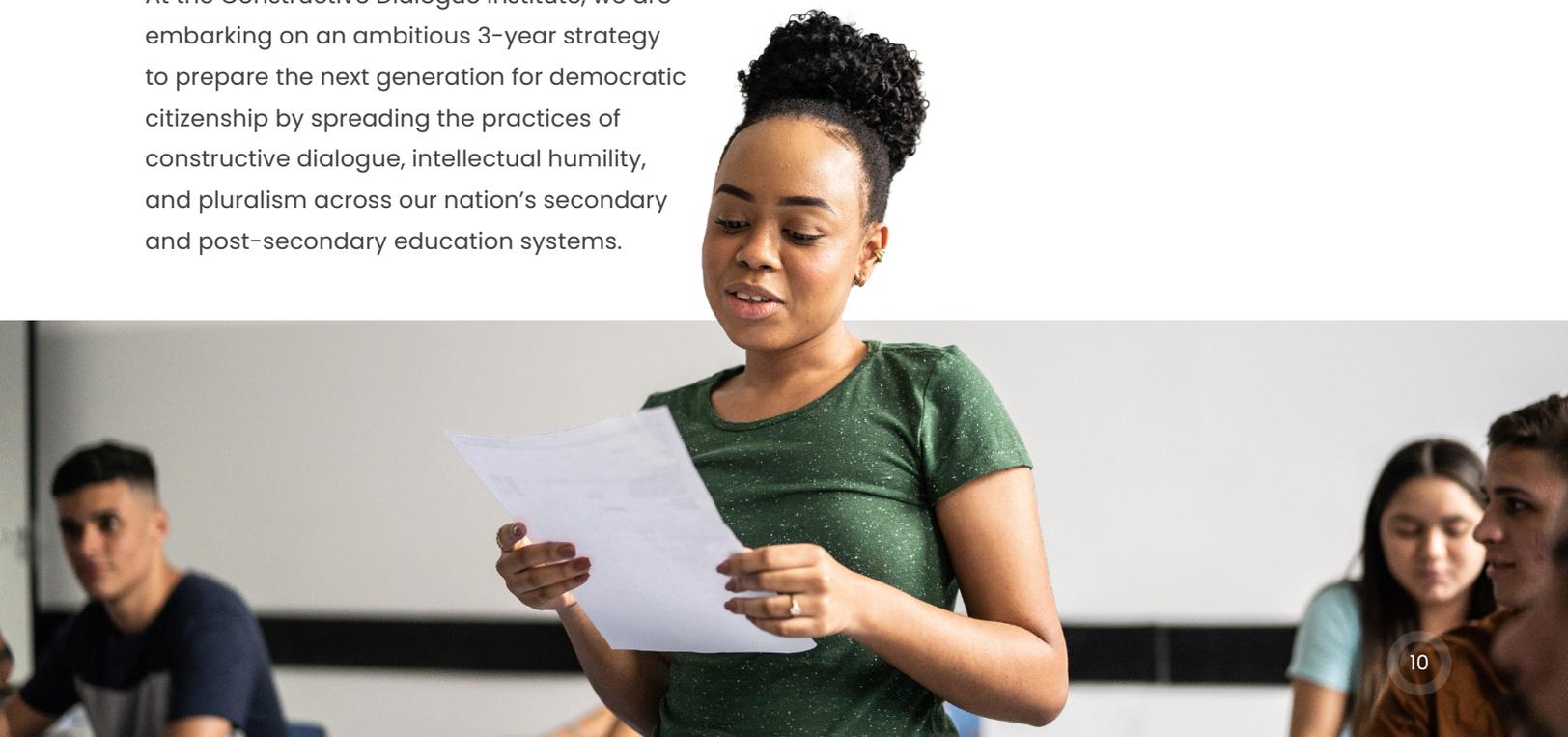
We are preparing the learners of today to become the informed and engaged citizens of tomorrow.

IMPROVING LEARNING TODAY, PREPARING CITIZENS OF TOMORROW

Not only will such educational initiatives prepare students to be informed and engaged citizens, but these skills will also enable students to succeed as 21st century learners, in and beyond the classroom. The intellectual virtues that make for effective citizens, such as intellectual humility and curiosity, also prepare students to be effective learners.⁷ Likewise, equipping students with the skills to empathize with others, engage in perspective-taking, and thoughtfully discuss divisive issues is necessary to create equitable and inclusive learning environments.

THE CONSTRUCTIVE DIALOGUE INSTITUTE'S ROLE

At the Constructive Dialogue Institute, we are embarking on an ambitious 3-year strategy to prepare the next generation for democratic citizenship by spreading the practices of constructive dialogue, intellectual humility, and pluralism across our nation's secondary and post-secondary education systems.



Our Mission, Vision, and Theory of Change

Our mission: To equip the next generation of Americans with the mindset and skill set to engage in dialogue across differences.

Givens	The promise of pluralism is foundational to American democracy, yet contemporary forces are pulling us apart	Adolescence and young adulthood are critical developmental periods for the formation of one's identity, values, and worldview	Educators are lacking training and support to create learning environments that support pluralism and intellectual virtues
Activities	Produce and disseminate research and thought leadership to elevate the value of pluralism and intellectual virtues to educational and civic outcomes	Develop high-quality, evidence-based educational tools to equip students with the skills for pluralism and intellectual virtues	Offer a suite of tools – proven to be effective for educational markets – that support educators in skills for fostering pluralistic values and intellectual virtues in their students
Near-Term Outcomes	Pluralism and intellectual virtues gain recognition as essential to achieving a flourishing society	There is widespread adoption of our programming by school systems and universities	Educators are effective at facilitating open and inclusive dialogue among students, modeling pluralism, and promoting intellectual virtues
Longer-Term Outcomes	There is wide-spread public awareness and demand for resources to support pluralism and intellectual virtues, leading to policy change	The next generation gains the skills and dispositions to think critically and engage constructively with differences	
Impact	America has a healthy civic culture to sustain a strong, pluralistic democracy		

What the Constructive Dialogue Institute Has Achieved



The Constructive Dialogue Institute Today

THE CONSTRUCTIVE DIALOGUE INSTITUTE OVERVIEW

Since our founding in 2017, the Constructive Dialogue Institute (formerly known as OpenMind) has established itself as a leading player in the emerging bridge building field. Our primary offering, Perspectives (formerly known as OpenMind), is an online learning experience that weaves together psychological concepts with engaging examples and scenarios. The program includes interactive online lessons and guides for peer-to-peer conversations.

WHAT SETS US APART:



Engaging

Our program is highly interactive and adaptive. As learners advance through the lessons, the program adapts based on their responses in order to create a personalized, engaging experience.



Evidence-Based

Perspectives brings the latest behavioral science research to life. Our ongoing rigorous scientific evaluation has demonstrated the effectiveness of our tools and enables us to iterate on an ongoing basis to maximize our positive impact.



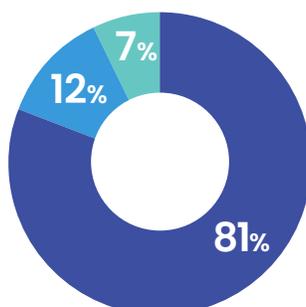
Easy to Use

Our off-the-shelf tools are easy for educators to implement in their classrooms. Our dashboard allows educators to easily track student progress and quiz scores.

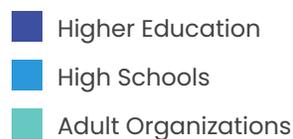


Scalable

Our digital format enables us to scale cost-effectively and maintain implementation fidelity of our tools.



CURRENT PERSPECTIVES LEARNERS BY TYPE

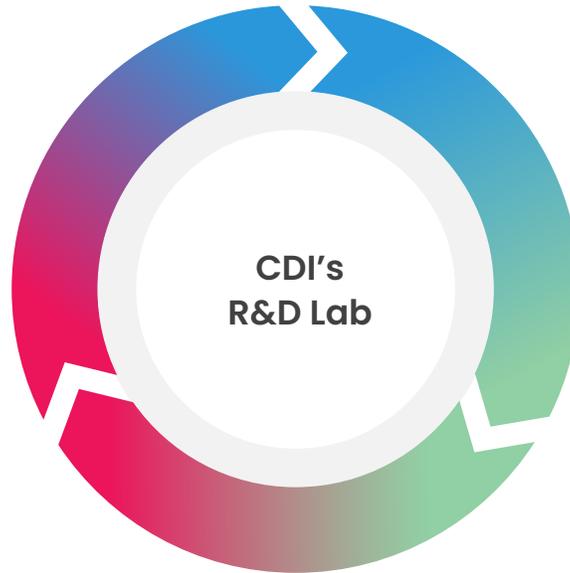


Our Approach

OUR RESEARCH-DRIVEN APPROACH:

STEP 1

Conduct research on the cultivation of pluralism and intellectual virtues



STEP 2

Translate research into tools to shift individual mindsets and behaviors, and institutional norms and group dynamics

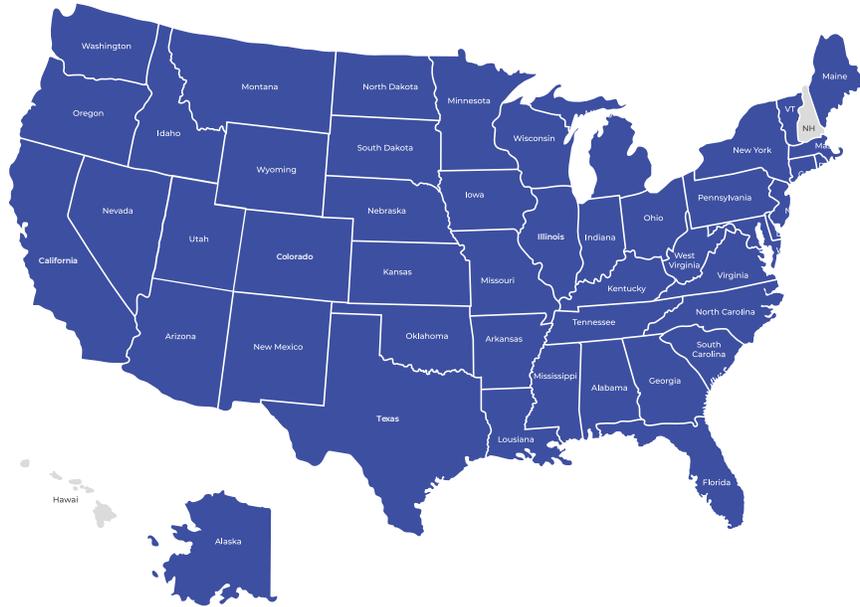
STEP 3

Conduct rigorous research to evaluate the effectiveness of our tools and inform future R&D

The Constructive Dialogue Institute’s products promote enduring behavior change through the following approach:

- 1 Establish **positive social norms**
- 2 Cultivate a **mindset** of intellectual humility, empathy, & openness to build motivation for positive engagement across differences
- 3 Equip learners with the **skill set** to communicate and collaborate with people of differing backgrounds, beliefs, and values
- 4 Provide tools to catalyze ongoing **practice** and **habit formation**

Between 2017 and 2021, We've Reached:



900+
Institutions

1,000+
Educators

48
States

100+
Disciplines

50,000+
Learners

95% of
Educators
Recommend

// Students regularly comment in their course evaluations that doing the [Perspectives] app gave them a changed perspective that represents the most important thing they will take from my class."

- Professor, Arizona State University

// [Perspectives] should be required of every 1st-year student at every institution of higher learning in America."

- Professor, College of the Sequoias

Our Impact

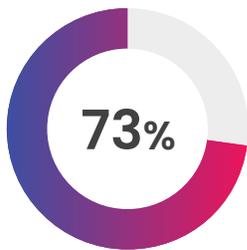
RESEARCH IS BAKED INTO THE DNA OF THE CONSTRUCTIVE DIALOGUE INSTITUTE.

In addition to building our educational tools and strategies based on the latest behavioral science research, we also conduct rigorous research on an ongoing basis to evaluate the effectiveness of our products. We then use this research to continuously improve our tools.

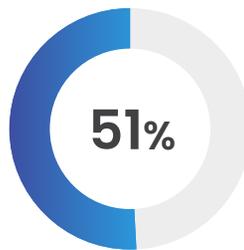
Over the past five years, we've collected data from more than 35,000 learners and conducted two randomized controlled trials. Our research demonstrates that our online learning program, Perspectives, results in a significant positive impact on individual learners and the culture of their classrooms.

OUR OUTCOMES

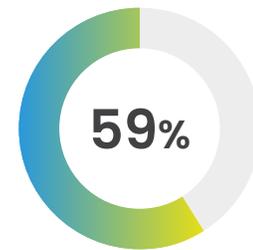
After completing Perspectives, learners show improvement in a variety of outcomes, including a decrease in hostility towards their political outgroup, and an intellectual humility, perspective-taking, and growth mindset. Learners also show a decrease in dichotomous thinking, social distancing from "the other side," and negative conflict behaviors.



of students decreased in hostility towards their political outgroup



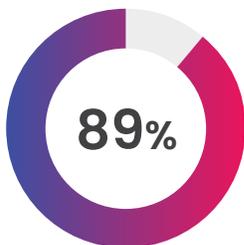
of students showed an increase in intellectual humility



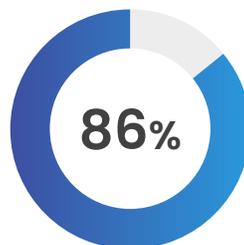
of students showed improvement in their negative conflict behaviors

6 MONTHS LATER

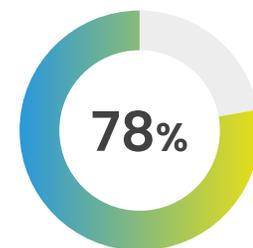
6 months after completing Perspectives, students report the following outcomes:



of students agreed that they have benefited from using Perspectives



of students agreed Perspectives helped them communicate across differences



of students still use strategies from Perspectives in classroom discussions

Strategic Plan FY22-24



The Five Pillars of the Constructive Dialogue Institute's Strategic Plan



1. Develop and evaluate educator- and student-facing tools to promote pluralism, intellectual humility, and constructive dialogue in schools and universities



2. Scale our educator- and student-facing tools across high schools and colleges to prepare next gen learners for democratic citizenship



3. Develop and execute a thought leadership agenda to establish the importance of intellectual humility and constructive dialogue to educational and civic outcomes and to position the Constructive Dialogue Institute as a leader in the space



4. Deliver turnkey solutions to adult audiences to satisfy demand and earn supplemental income



5. Build the organization's infrastructure to sustainably achieve our goals



RATIONALE



PILLAR 1.

Develop and evaluate educator- and student-facing tools

To turn the tide on decades of rising polarization, we will **focus on the next generation**, helping them learn skills and form habits that will shape how they participate in society. To access next generation learners, we will work primarily with high schools and colleges. Our strategy is informed by the following two bodies of research:

Brain science supports a focus on adolescence and young adult years

- **The brain undergoes dramatic development in adolescence.**⁸ This includes the maturation of cognitive capacity to adult levels,⁹ as well as functional and structural changes in the “social brain” – areas of the medial prefrontal cortex and the superior temporal sulcus.⁸
- **Identity development** – including a sense of membership in social groups – is an important developmental milestone in adolescence.¹⁰ Research shows that political identity develops between ages 14 and 24, with the influence of external events peaking at age 18–19.¹¹
- Interventions targeting pluralistic mindsets and intellectual virtues **may be most effective during this developmental period**, when such interventions have the potential to impact the trajectory of brain development.

Research shows that focusing on students and educators leads to greatest impact

- To be most effective in educational environments, **it is critical to support students’ skills development and create a context that supports that development.**
- Research suggests that growth mindset curricula, for example, are more effective over longer periods of time when teachers also exhibit a growth mindset.¹²
- **Providing professional development for educators can enhance buy-in and deepen knowledge** in ways that can lead to better modeling of skills and high-fidelity implementation of curricula.¹³
- We will develop and test a suite of resources for high school and higher education instructors designed to foster intellectual humility and constructive dialogue in the classroom. Our hypothesis is that pairing these professional learning resources with our student-facing interventions will lead to **deeper and more enduring changes among students.**

LEARNING AGENDA:

As part of our **learning agenda**, we will monitor and evaluate the following questions in order to inform our activities over the course of the three year period and beyond:

- Are shorter educational interventions impactful in achieving our desired outcomes?
- Does equipping educators with the tools to support constructive dialogue in their classrooms support the development of bridge-building skills in next generation learners?
- How should we allocate our resources between the higher education and high school markets in order to maximize our impact?

METRICS AND ACTIVITIES

PILLAR 1. Develop and evaluate educator- and student-facing tools

	OBJECTIVE 1	OBJECTIVE 2
Main Goal	Build a suite of tools for teachers, professors, and students to promote constructive dialogue in classrooms	Conduct research to evaluate the effectiveness of our tools on educational and civic outcomes
Quantitative Goals	<ul style="list-style-type: none"> • Develop a new suite of tools for teachers and professors • Optimize and expand our existing suite of student-facing tools 	<ul style="list-style-type: none"> • Evaluate the effectiveness of our educator tools on short-term educator and classroom outcomes • Evaluate the effectiveness of our student tools on short- and long-term attitudinal, behavioral, and educational outcomes
Metrics	<ul style="list-style-type: none"> • Educator satisfaction rates • Educator Net Promoter Score • Educator completion rates • Student satisfaction rates • Student Net Promoter Score • Student completion rates 	<ul style="list-style-type: none"> • Average effect size for students, teachers, professors, and classrooms • Average effect sizes at post-intervention, 6-month follow-up, and 12-month follow-up
Activities	<ul style="list-style-type: none"> • Tools for Teachers & Professors: <ul style="list-style-type: none"> • Conduct a discovery phase to understand the competitive landscape and educator needs • Create and execute a development roadmap • Build a suite of effective educator-facing tools • Tools for Students: <ul style="list-style-type: none"> • Modify and maintain the existing student-facing program to facilitate increased scaling and effectiveness • Develop new student resources in years 2-3 based on expressed student and educator needs 	<ul style="list-style-type: none"> • Conduct a Randomized Controlled Trial (RCT) of educator-facing resources to evaluate their effectiveness • Conduct an RCT of student-facing resources, with longitudinal follow-up to evaluate their short- and long-term effectiveness

RATIONALE

PILLAR 2.

Scale educator- and student-facing tools

Our commitment has always been to **develop practical, evidence-based tools that have the potential to scale broadly**. With societal divisions becoming ever more entrenched, we plan to leverage three cost-effective and high-impact pathways to rapidly scale our educator- and student-facing tools over the next 3 years. Our aim is to impact millions of next generation learners and strengthen America's civic culture.

Distribution Partnerships

- We will develop **partnerships** with schools, districts, university systems, charter networks, prominent EdTech platforms, and national associations responsible for educating millions of students. We plan to leverage their existing networks to rapidly scale.
- We expect to **generate 50% of our growth** through this strategy.

Thought Leadership

- We will pursue a **thought leadership strategy** to establish constructive dialogue as a critical component of education (see Pillar 3 for further detail).
- Through large scale campaigns, white papers, and articles co-authored with prominent thought leaders, we hope to drive significant inbound interest in CDI.
- We expect to **generate 40% of our growth** through this strategy.

Direct-to-Educator

- We will build an active **Community of Practice** for educators looking to connect with peers, share best practices, and facilitate constructive dialogue in their classrooms.
- We will develop resources to support **CDI Educator Ambassadors** to serve as champions and help us expand our community.
- We expect to **generate 10% of our growth** through this strategy.

LEARNING AGENDA:

As part of our **learning agenda**, we will test several key hypotheses in our current go-to-market strategy:

- Our initial plan is to allocate equal resources to the high school and higher education markets; however, we will shift more resources towards one market if we find that our ability to scale is greater in one market than the other.
- We believe we can drive 90% of our growth through key partnerships and a wide-reaching thought leadership agenda focused on the power of constructive dialogue. We will evaluate whether these pathways allow for the level of growth we are envisioning.

METRICS AND ACTIVITIES

PILLAR 2. Scale educator- and student-facing tools

OBJECTIVE 1	
Main Goal	Scale CDI tools to reach 10,000 educators and 700,000 students annually across the high school and higher education markets by 2024
Quantitative Goals	<ul style="list-style-type: none"> • Reach <ul style="list-style-type: none"> • 5,000 educators annually use CDI's educator-facing tools, reaching over 300,000 students • 8,000 educators and administrators annually bring the Perspectives program to their schools, campuses, and classrooms, reaching over 500,000 students • Establish 15-20 key partnerships, generating 50% of our growth goals • Generate 10% of our operating budget annually from educator-facing and institutionally-packaged tools
Metrics	<ul style="list-style-type: none"> • # of educators and administrators using our tools • Total learners reached • % of educator and administrator follow-through and retention • % of growth goals reached through direct-to-educator initiatives • # of growth partners • % of growth goals generated by partners • Total customer acquisition costs/number of customers
Activities	<ul style="list-style-type: none"> • Establish relationships with targeted distribution partners, schools, networks, and industry-specific affinity groups • Launch a thought leadership agenda (detailed in Pillar 3) • Build an active Educator Community of Practice, providing access to high-quality content and opportunities to connect with peers and CDI

RATIONALE



PILLAR 3.

Develop and execute a thought leadership agenda

Constructive dialogue, intellectual humility, and pluralism can serve as the foundation for other important initiatives taking place in schools and universities. These skills and practices are core to civics education and can facilitate the work to advance diversity, equity, inclusion, and belonging, enable social emotional learning and character education, and build positive climates. We aim to position the Constructive Dialogue Institute as foundational to these initiatives.

Civics Education

Diversity, Equity,
Inclusion, and
Belonging

Social-
Emotional Learning
and Character Ed

Classroom and
School Climate

Intellectual humility, pluralism, and constructive dialogue provide the foundational mindset and skill set required for students and adults to learn, engage, and thrive in a diverse world.

To accomplish this goal, we will pursue two complementary strategies:

Original research establishing a link between CDI outcomes and desirable educational and civic outcomes

Leveraging our embedded assessments and randomized controlled trials, we will produce original research linking pluralism, intellectual humility, and constructive dialogue to key indicators of a successful education and a flourishing society.

Traditional thought leadership strategies

We will pursue a variety of thought leadership strategies, including large-scale campaigns tied to national events, the publication of white papers and op-eds in targeted channels, attendance and sponsorship of key conferences, and the creation of a Thought Leadership Council to provide credibility and visibility to this work.

LEARNING AGENDA:

As part of our **learning agenda**, we will evaluate the impact of our thought leadership initiatives and assess the highest value strategies moving forward. Specifically, we will evaluate the following:

- Are our thought leadership initiatives enough to shift the conversation at a sector-wide level?
- Which thought leadership strategies generate the most reach and adoption of our tools?

METRICS AND ACTIVITIES

PILLAR 3. Develop and execute a thought leadership agenda

	OBJECTIVE 1	OBJECTIVE 2
Main Goal	Produce original research that advances the field of bridge-building within educational settings	Establish CDI as an expert and resource for national and sector-specific media
Quantitative Goals	<ul style="list-style-type: none"> • 9 academic papers • 9 academic presentations • 6 white papers 	<ul style="list-style-type: none"> • Publish 8 pieces annually in national or sector-wide publications • Receive 24 national mentions annually • Run 8 large-scale campaigns • Achieve at least 40% of growth from inbound interest
Metrics	<ul style="list-style-type: none"> • # of papers published • # of academic presentations • # of white papers released 	<ul style="list-style-type: none"> • # of publications in popular press outlets • # of media mentions • # of large-scale campaigns • % of growth from inbound interest
Activities	<ul style="list-style-type: none"> • Conduct research to establish the link between bridge-building skills and other meaningful educational and civic outcomes • Conduct an annual survey to provide actionable insights to the bridge-building field; disseminate findings through white papers • Continue academic partnerships with researchers exploring the link between bridge-building skills and/or intellectual virtues and other meaningful educational and civic outcomes 	<ul style="list-style-type: none"> • Create an annual thought leadership calendar, organized around CDI's research findings, expertise, and key moments in the national and sector-specific press • Produce think pieces and/or op-ed pieces in targeted channels • Identify 2–4 of those thought leadership topics to organize broader campaigns around annually, with a focus on receiving media coverage across platforms • Create a high-profile Thought Leadership Council to provide credibility and visibility to CDI and to promote the importance of constructive dialogue • Establish ourselves as one of the go-to experts for journalists covering polarization and the role of constructive dialogue in education and the workplace

RATIONALE



PILLAR 4. Deliver turnkey solutions to adult audiences

Successful Track Record

Over the past three years, CDI has experienced **inbound interest** in its offerings from companies, local governments, non-profits, and religious communities. We have responded to this demand by creating lightly modified versions of our program for diverse adult audiences and charging sliding scale fees for for-profit vs. non-profit organizations.

In 2021, serving these audiences **generated earned revenue that represented approximately 20% of our total expenses** for the year.

Our products received **strong customer satisfaction ratings**, and our research demonstrated that our product is **equally effective** with adult audiences as it is with educational audiences.

The Opportunity

We recognize that adult organizations offer an **earned-income opportunity** for our products if they can be provided without distracting focus from our next generation learners and educators strategy.

Over the next three years, we hope to generate earned revenue equivalent to **25% of our total annual operating expenses** with only 10% of our organizational resources. To advance this goal, we will pursue a three-pronged strategy:

Licensing Automation

- Automate our offerings for small- and mid-size clients, thereby reducing expenses while continuing to serve this market

Distribution Partnerships

- Establish distribution partners in key markets to generate new leads while outsourcing marketing and sales

High-Impact, High Margin Services

- Continue to offer high-impact, high-margin services to select large clients

LEARNING AGENDA:

- Over the course of the 3 year period, we will monitor whether our adult audiences are yielding our desired revenue. If not, we will evaluate whether to continue. If we find this market is meeting or exceeding our revenue targets, we will evaluate whether there are opportunities for additional high margin offerings.

METRICS AND ACTIVITIES

PILLAR 4. Deliver turnkey solutions to adult audiences

OBJECTIVE 1	
Main Goal	<ul style="list-style-type: none"> • Automate the licensing process for small-/mid-sized clients • Establish distribution partners in key markets • Deliver high-impact, high-margin services to select large clients
Quantitative Goals	<ul style="list-style-type: none"> • Reach 13,000 learners annually • Generate 25% of our operating budget annually, using only 10% of organizational resources
Metrics	<ul style="list-style-type: none"> • # of adult learners • % of operating budget supported by earned revenue generated by adult audiences • Margins on larger client engagements
Activities	<ul style="list-style-type: none"> • Build an automated licensing process for adult organizations requiring less than 100 seats • Engage adult audiences through low-resource, highly profitable approaches to business development and new product exploration, with high-touch support reserved for large, profitable engagements • Maintain existing anchor partners • Increase reach and increase ROI on adult audiences by establishing distribution partners in relevant markets • Generate new inbound interest through targeted thought leadership initiatives



RATIONALE, METRICS, AND ACTIVITIES



PILLAR 5.
Build the organization’s infrastructure to sustainably achieve our goals

	OBJECTIVE 1	OBJECTIVE 2
Main Goal	Develop a nimble staffing plan, adding capacity and expertise commensurate with growth	Expand the Board to 8-10 diverse directors who encompass the key competencies needed to effectively govern and guide CDI
Metrics	<ul style="list-style-type: none"> • Average time to hire/position • Employee Net Promoter Score and engagement scores • Budget/learner ratio 	<ul style="list-style-type: none"> • # of board members
Activities	<ul style="list-style-type: none"> • Expand our growth, research, learning solutions, and development teams • Implement initiatives to maintain strong employee engagement and retention • Monitor budget spent per learner and implement initiatives to increase productivity 	<ul style="list-style-type: none"> • Develop a vision for the roles, responsibilities, and composition of the Board • Create recruitment and onboarding/ orientation process for new board members • Recruit new directors to expand the Board to reach and maintain a board size of 8-10 directors

	OBJECTIVE 3	OBJECTIVE 4
Main Goal	Execute a fundraising and earned revenue strategy to generate 35% of expense costs through earned revenue	Rebrand OpenMind as CDI to achieve distinctive organizational identity, and redesign our website to provide an intuitive user experience
Metrics	<ul style="list-style-type: none"> • Philanthropic earnings • Earned revenue as a percentage of operating expenses • Liquid assets/current liabilities • Cash on hand 	<ul style="list-style-type: none"> • Monthly unique visitors • Search rankings • Organic traffic % • Conversion rate
Activities	<ul style="list-style-type: none"> • Launch a Growth Campaign to secure the multi-year revenue required to achieve our strategic plan objectives • Maintain an organizational reserve of > 4 months • Maintain quick ratio >1 • Generate at least 35% of total budget from earned revenue 	<ul style="list-style-type: none"> • Rebrand CDI's name and identity. • Redesign CDI's website in order to provide for an intuitive user experience with clear pathways for every audience who might engage on the website • Create on-demand videos and resources to support ease of sign-up and implementation of CDI's tools



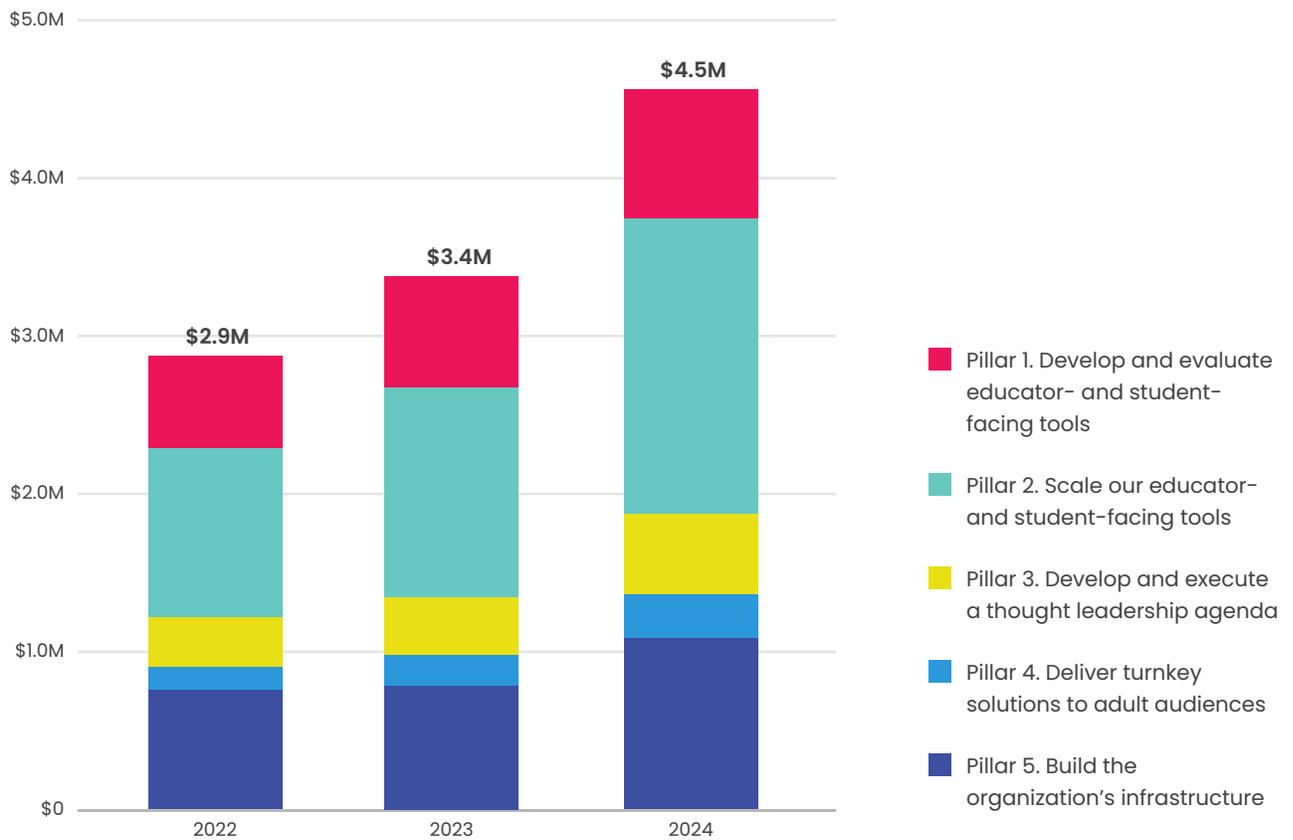
Financials

EXPENDITURES

HOW WILL WE INVEST TO ACHIEVE THESE OUTCOMES?

Each of our five strategic objectives will require an increased investment in order to achieve our ambitious goals. We expect average annual expense growth of approximately 25% for the organization overall. We have developed this financial model by prioritizing efficient short-term investments that can lead to significant long-term impact and sustainability.

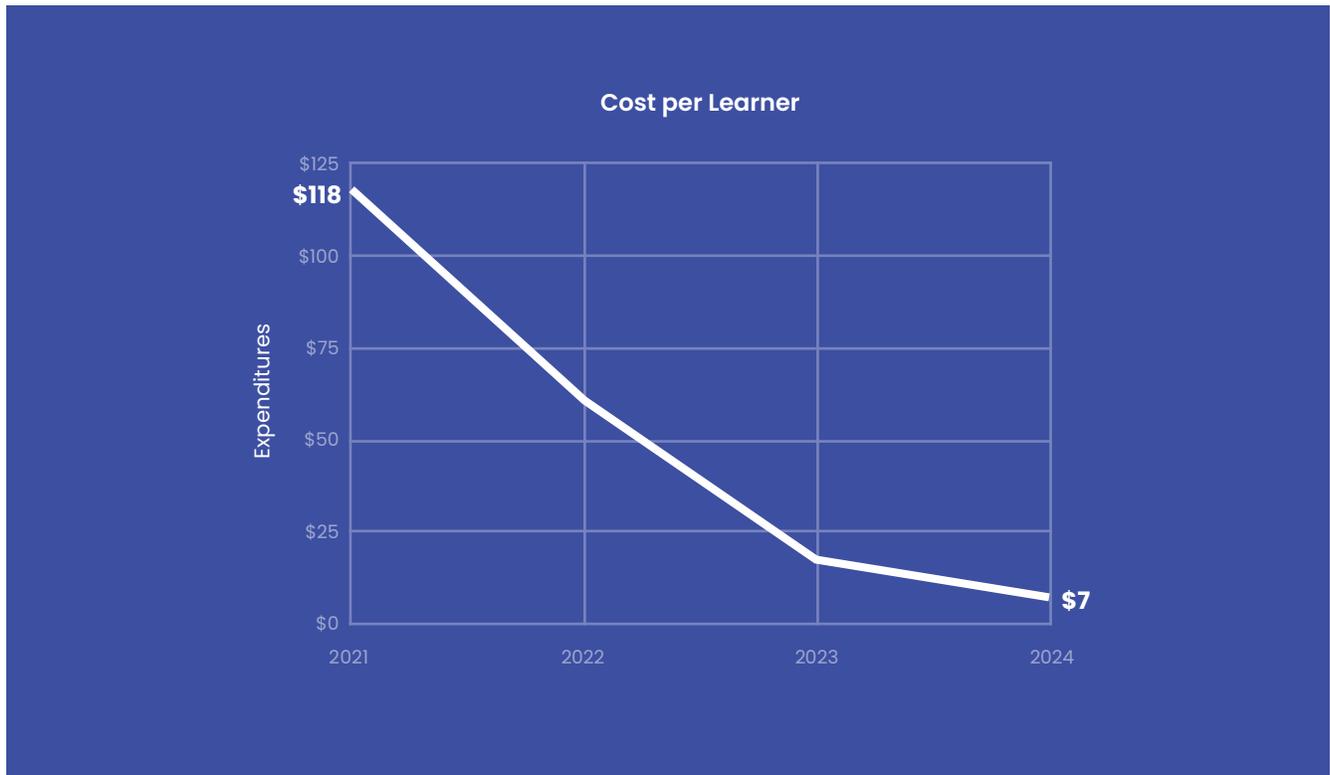
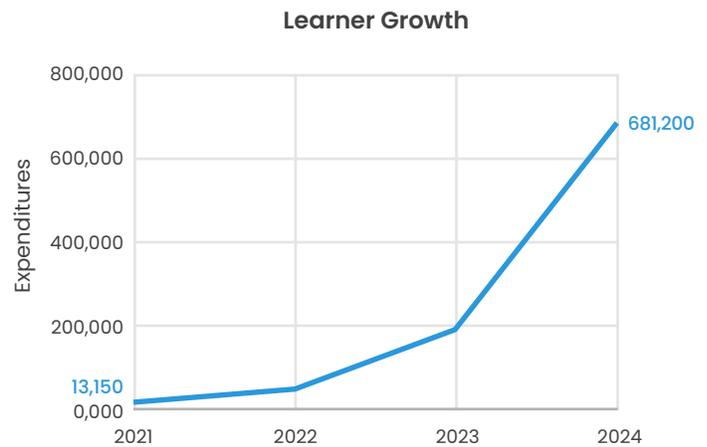
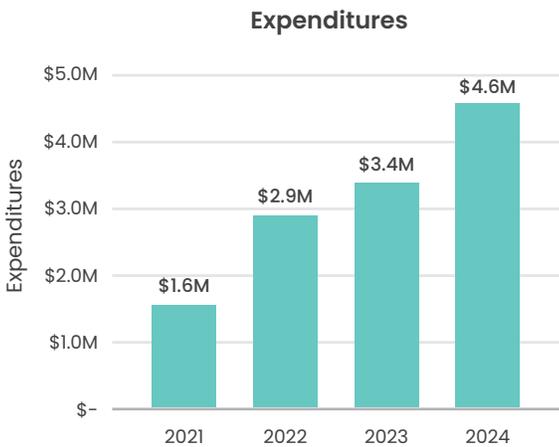
Expenditures by Objective



COST PER LEARNER

HOW WILL WE INVEST TO DELIVER A SUSTAINABLE RETURN ON INVESTMENT?

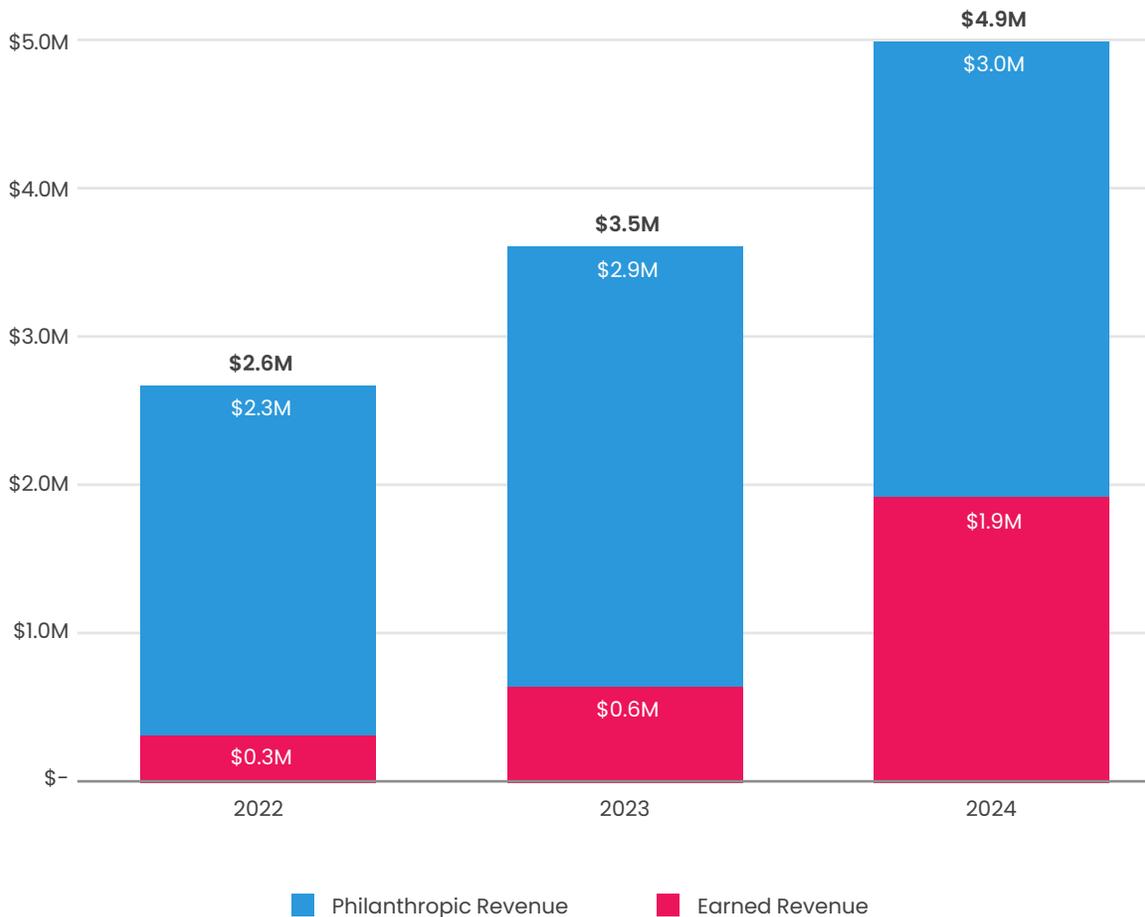
We plan to leverage every dollar to deliver maximum ROI. Over the next three years, our investments in product development, research, distribution partners, and expanding our talented team, will allow us to decrease our cost from \$118 per learner to less than \$7 per learner. We expect at least one third of ongoing costs to be supported by earned revenue. We have designed this strategy to allow for rapid, sustainable scaling.



REVENUE*

To expand our reach 50x, we will only need to increase our annual revenue 3x, representing impressive economies of scale. Further, by 2024 we aim to support at least 35% of our annual operating budget through sustainable earned revenue streams, with the remainder coming from philanthropic support.

From 2022-2024, CDI will require a total of \$11.1 million to develop our products, expand our earned revenue, and achieve ambitious scale. With \$2.8 million anticipated to come from earned revenue streams, we are looking for a generous community of philanthropic partners to invest the remaining \$8.3 million over 3 years.



* Revenue goals have been calculated to cover annual operating expenses and maintain a 4 month operating reserve. CDI's revenue target is lower than expenses in 2022 due to previously accrued revenue that will support the 2022 budget.

JOIN US to provide the next generation with the mindset and skill sets to build a healthy civic culture and sustain a strong, pluralistic democracy

LEADERSHIP CIRCLE \$1 MILLION AND ABOVE OVER 3 YEARS

As a member of the Leadership Circle, you will:

- Be invited to 3 virtual briefings per year, where we will report on our progress, highlight key learnings, and invite thought leaders in the fields of democracy and education to speak with the group.
 - Have the opportunity to join us in-person once a year for a leadership convening to engage in strategic discussions and hear from thought leaders.
 - Engage with CDI as a partner and co-champion of constructive dialogue, with opportunities to engage on an individual basis, as desired.
 - Be recognized for your critical support on our website, in our annual progress reports, and in other outlets over the course of 2022–2024
-

INVESTORS CIRCLE \$300,000 AND ABOVE OVER 3 YEARS

As a member of the Investors Circle, you will:

- Be invited to 3 virtual briefings per year, where we will report on our progress, highlight key learnings, and invite thought leaders in the fields of democracy and education to speak with the group.
 - Engage with CDI as a partner and co-champion of constructive dialogue, with opportunities to engage on an individual basis, as desired.
 - Be recognized for your critical support on our website, in our annual progress reports, and in other outlets over the course of 2022–2024
-

CHAMPIONS CIRCLE \$75,000 AND ABOVE OVER 3 YEARS

As a member of the Champions Circle, you will:

- Receive an annual progress report, reviewing our organization’s progress against goals and highlighting key learnings
- Be invited to an annual virtual convening, where we will provide a more in-depth update on our progress, engage all members in a strategic discussion, and provide an opportunity to hear from thought leaders in the fields of democracy and education
- Be recognized for your critical support on our website, in our annual progress reports, and in other outlets over the course of 2022–2024

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