

MINDING THEIR CIVIC BUSINESS:
APPENDIX

September, 2004

APPENDIX
- Table of Contents -

A. Detailed Methodology	3
B. List of Regions and Business-Civic Organizations Profiled	5
C. List of Advisory Committee Members	6
D. List of Interviews	7
E. Introductory Letter	12
F. Interview Guide for “Executives”	13
G. Interview Guide for “Board Members”	16
H. Interview Guide for “Partners”	19
I. Web-based Survey for “Executives”	22

APPENDIX A

-- Detailed Methodology --

Between September 2003 and January 2004, FutureWorks conducted 128 in-depth interviews among regional business-civic leaders in 29 large metropolitan regions in the US and Canada.

Criteria for Selecting US Regions

The 29 regions were selected based on multiple criteria:

- All regions are included in the Top 50 Metropolitan Statistical Areas (MSAs) in terms of their population. New York City and Los Angeles, however, were not considered due to their extremely large sizes and complicated natures;
- Based on recommendations and insight given by the advisory committee (see more on the committee later in Methodology), regions were selected based on interesting and distinctive best practices among their business-civic organizations and leaders;
- Finally, of the pared down list of regions, those included were MSAs in which the major business-civic organizations were willing to participate in the study

Description of Participants

Participants fell into two types:

- Presidents, CEOs, Executive Directors or high-level managers of regionally-focused business-civic organizations (N=63)
- Board Members of these business-civic organizations, also typically Presidents and CEOs of major corporations along with Presidents, CEOs, Executive Directors or high-level managers at partner organizations, typically civic- or community-minded institutions (N=65)

A list of participants, along with their regions and affiliations, can be found in the Appendix.

Contacting Participants

A number of correspondences took place with participants before the actual research was conducted. Target respondents were first contacted with an introductory letter from Joe Roman, a member of the advisory committee. (See Appendix for a copy of the introductory letter.)

Within two weeks, FutureWorks staff then followed up with a phone call to confirm receipt of the letter, go over next steps and address any of the participants' concerns or questions. Sometimes FutureWorks staff members were able to get in touch directly with participants or their assistants on the first attempt; other times, the project team made multiple attempts. Interviews were ultimately scheduled with a majority target respondents.

Prior to the interviews, FutureWorks staff sent scheduled participants a copy of the interview guide and a brief overview of the project if requested.

Conducting the Research

The interviews were primarily conducted by telephone (a few were conducted in person, for logistical purposes only) and lasted anywhere from 20 to 90 minutes each. Each type of participant was asked a unique set of questions, but all interviews touched upon the following topics:

- The health of the particular region's economy
- The organization's most important regional priorities currently and the process by which the organization is taking on those issues
- The business-civic competitive landscape: how the business-civic organization differentiates itself from similar institutions in the region
- The changing role of the business community in terms of regional civic issues

In addition to a telephone interview, the executives from business-civic institutions were also asked to complete (or have a deputy, high-level manager or other executive within the organization complete) a brief web-based survey that included less in-depth but rather more operational questions, such as:

- Number of staff members currently and five years ago
- Number of members currently and five years ago, and reasons for an increase or decrease
- Methods for calculating dues or fees
- What members see as the top benefits of membership
- Operational budget currently and five years ago, and reasons for an increase or decrease

A copy of the three interview guides and the web-based survey is included in the Appendix.

Participants' Incentive

As an incentive, participants were offered a final summary of findings – including the compendium of regional profiles – from this study. Participants were also told they'd be able to receive earlier, preliminary findings if desired.

Advisory Committee

An advisory committee was assembled to lend credibility to the project and be a resource to the project team. It also had a few specific roles. First, early on in the project, the committee reviewed and approved the study's methodology along with the interview guides and web-based survey. Secondly, when necessary, members of the committee opened doors to contacts and/or participants. Next, they reviewed and provided feedback on findings and draft reports. Finally, the advisory committee offered a strategy for the dissemination and usage of the final product.

APPENDIX B

-- List of Regions and Business-Civic Organizations Profiled --

Regions	Regional Business-Civic Organizations
Atlanta, GA MSA	Allegheny Conference on Community Development and Affiliates
Austin-San Marcos, TX MSA	Austin Area Research Organization, Inc. (AARO)
Boston, MA-NH PMSA	Bay Area Council
Chicago-Gary-Kenosha, IL-IN-WI CMSA	Bay Area Economic Forum
Cleveland-Lorain-Elyria, OH CMSA	Central Indiana Corporate Partnership
Columbus, OH MSA	Chicago Metropolis 2020
Dallas-Fort Worth-Arlington, TX CMSA	Civic Committee of the Commercial Club of Chicago
Denver-Boulder-Greeley, CO CMSA	Civic Council of Greater Kansas City
Detroit MSA	Civic Progress, Inc. (St. Louis)
Grand Rapids-Muskegon-Holland, MI MSA	Columbus Partnership
Houston, TX CMSA	Denver Metro Chamber of Commerce
Indianapolis, IN MSA	Detroit Regional Chamber
Kansas City, MO MSA	Detroit Renaissance
Louisville, KY MSA	Grand Rapids Chamber
Miami, FL CMSA	Great North Alliance
Minneapolis-St. Paul, MN-WI MSA	Greater Austin Chamber of Commerce
New Orleans, LA MSA	Greater Boston Chamber of Commerce
Norfolk-Virginia Beach-Newport News, VA-NC MSA	Greater Cleveland Partnership
Ottawa Metro Region, Canada	Greater Columbus Chamber of Commerce
Philadelphia, PA CMSA	Greater Houston Partnership
Phoenix-Mesa, AZ MSA	Greater Indianapolis Chamber of Commerce
Pittsburgh, PA MSA	Greater Kansas City Chamber of Commerce
Raleigh-Durham-Chapel Hill, NC MSA	Greater Louisville Inc.
San Diego, CA MSA	Greater New Orleans Inc.
San Francisco-Oakland-San Jose CMSA	Greater Phoenix Leadership, Inc.
Seattle-Bellevue-Everett, WA CMSA	Greater Seattle Chamber
St. Louis, MO MSA	Greater Triangle Regional Council, Inc.
Toronto Metro Region, Canada	Greater Washington Board of Trade
Washington, D.C. CMSA	Hampton Roads Partnership
	Metro Atlanta Chamber of Commerce
	Metro Denver Chamber of Commerce
	Metropolitan Affairs Coalition (Detroit)
	Metropolitan Planning Council (Chicago)
	North Texas Commission
	Ottawa Centre for Research and Innovation (OCRI)
	Pennsylvania Economy League (Southeastern PA)
	Regional Business Alliance (South Florida)
	Regional Business Coalition for Metropolitan Atlanta
	Regional Business Council (St. Louis)
	San Diego Dialogue
	St. Louis Regional Chamber and Growth Association
	The Ottawa Partnership (TOP)
	The Right Place, Inc. (Grand Rapids)
	Toronto Board of Trade
	Toronto City Summit Alliance

APPENDIX C
– List of Advisory Committee Members –

Carl Anthony, Program Officer, Ford Foundation

Frank H. Beal, Executive Director, Chicago Metropolis 2020

Everett M. Ehrlich, Senior Vice President and Director of Research, Committee for Economic Development

Richard Fleming, President and Chief Executive Officer, St. Louis Regional Chamber and Growth Association

James Gibson, Senior Policy Advisor, Center for the Study of Social Policy

Bruce Katz, Vice President and Director, The Brookings Institution's Metropolitan Policy Program

Robert Milbourne, President, Columbus Partnership

Joseph Roman, President and CEO, Greater Cleveland Partnership

George Vradenburg, Strategic Advisor, AOL Time Warner, Inc.

Robert Yaro, Executive Director, Regional Plan Association

APPENDIX D
– List of Interviews –

Name	Title	Organization	Region	Other affiliation
Tom Weyandt	Department Director, Comprehensive Planning	Atlanta Regional Commission (Partner Organization)	Atlanta	
Paul Kelman	Executive Vice President	Central Atlanta Progress (Partner Organization)	Atlanta	
George Dusenbury	District Director	Congressman Lewis District Office (Partner Organization)	Atlanta	
Sam Williams	President	Metro Atlanta Chamber of Commerce	Atlanta	
Eric Meyer	Executive Director	Regional Business Coalition	Atlanta	
Barbara Johnson	Executive Director	Austin Area Research Organization	Austin	
Kristin Gosset	Executive Director	Austin Idea Network	Austin	
Mike Rollins	President	Greater Austin Chamber of Commerce	Austin	
Paul Guzzi	President & CEO	Greater Boston Chamber of Commerce	Boston	
Marc Dreisen	Executive Director	MAPC (Partner Organization)	Boston	
Alan McDonald	Executive Director	Massachusetts Business Roundtable	Boston	
E. Hoy McConnell, II	Executive Director	Business and Professional People for the Public Interest (Partner Organization)	Chicago	
Frank Beal	Executive Director	Chicago Metropolis 2020	Chicago	
Nancy Finfer	Senior Executive	Chicago Metropolis 2020	Chicago	
Dea Meyer	Vice President	Civic Committee of the Commercial Club of Chicago	Chicago	
Erika Poethig	Program Officer	MacArthur Foundation (Partner Organization)	Chicago	
David Bennet	Executive Director	Metropolitan Mayors Caucus (Partner Organization)	Chicago	
Rita Athas	Secretary-Treasurer	Metropolitan Mayors Caucus (Partner Organization)	Chicago	
Scott Goldstein	VP of Policy and Planning	Metropolitan Planning Council	Chicago	
David Abbott	President	George Gund Foundation (Partner Organization)	Cleveland	
Dan Berry	Organizational Advancement Department	Greater Cleveland Partnership	Cleveland	
Joe Roman	President & CEO	Greater Cleveland Partnership	Cleveland	

Name	Title	Organization	Region	Other affiliation
Bob Milbourne	Executive Director	Columbus Partnership	Columbus	
David Powell	Executive Vice President, Economic Development	Greater Columbus Chamber	Columbus	
Larry Hilsheimer	Chairman of the Board	Greater Columbus Chamber	Columbus	Regional Managing Partner, Deloitte & Touche, LLP
Michael Fiorile	Past Chairman of the Board	Greater Columbus Chamber	Columbus	President & CEO, Dispatch Broadcast Group
David Biegler	Board Member and Former Chairman	Dallas Citizens Council	Dallas/Fort Worth	Chairman & CEO, Estrella Energy
Donna Halstead	President	Dallas Citizens Council	Dallas/Fort Worth	
Bill Thornton	President & CEO	Fort Worth Chamber	Dallas/Fort Worth	
Jan Hart Black	President	Greater Dallas Chamber	Dallas/Fort Worth	
Dan Petty	President	North Texas Commission	Dallas/Fort Worth	
John Carpenter	Chairman of the Board	North Texas Commission	Dallas/Fort Worth	Vice President, American Airlines
Joe Blake	President & CEO	Metro Denver Chamber	Denver	
Tom Clark	President & CEO	Metro Denver Chamber	Denver	
Richard Blouse	President & CEO	Detroit Regional Chamber	Detroit	
Paul Hillemonds	President	Detroit Renaissance Inc.	Detroit	
Paul Tait	President	Metropolitan Affairs Coalition	Detroit	
Vickie Kovari	Metro Equity Project Director	MOSES (Partner Organization)	Detroit	
Mark Lamoine	Director of Policy and Governmental Affairs	Grand Rapids Chamber	Grand Rapids	
Birgit Klohs	President	The Right Place, Inc.	Grand Rapids	
Charlie Savino	Executive Vice President & COO	Greater Houston Partnership	Houston	
David Goodrich	President	Central Indiana Corporate Partnership	Indianapolis	
Jeff Smulyan	Past Chairman of the Board	Central Indiana Corporate Partnership	Indianapolis	
Dave Griffiths	Chairman of the Board	Greater Indianapolis Chamber	Indianapolis	President & CEO, Citizens Gas and Coke Utility
John Myrland	President	Greater Indianapolis Chamber	Indianapolis	
Greg Schenkel	President & CEO	IndyPartnership (Partner Organization)	Indianapolis	
Jewel Scott	President & CEO	Civic Council of Greater Kansas City	Kansas City	
Jeff Comment	Past Chair	Greater Kansas City Chamber of Commerce	Kansas City	Chairman & CEO, Helzberg Diamonds
Karen Pletz	Chairman of the Board	Greater Kansas City Chamber of Commerce	Kansas City	President & CEO, The University of Health Sciences of Osteopathic Medicine
Peter Levi	President	Greater Kansas City Chamber of Commerce	Kansas City	
Terry Dunn	Immediate Past Chair	Greater Kansas City Chamber of Commerce	Kansas City	President & CEO, J.E. Dunn Construction Co.
Gwen Grant	President & CEO	Urban League (Partner Organization)	Kansas City	

Name	Title	Organization	Region	Other affiliation
Steve Higdon	President	Louisville Inc.	Louisville	
Mary Lou Tighe	COO	Greater Miami Chamber of Commerce	Miami	
Michael Corbit	Executive Director	Internet Coast	Miami	
Ralph Marrinson	Chair	Regional Business Alliance of South Florida	Miami	President and Owner, Marrinson Senior Care Residences
Doug Petty	CEO	Great North Alliance	Minneapolis/Saint Paul	
Curt Johnson	Secretary, Executive Committee	Great North Alliance Greater Minneapolis Chamber	Minneapolis/Saint Paul	President, The CitiStates Group
Todd Klingel	President & CEO		Minneapolis/Saint Paul	
Cyndi Leshner	Chairman of the Board	St. Paul Area Chamber	Minneapolis/Saint Paul	Vice President and Chief Administrative Officer, Xcel Energy
Larry Dowell	President	St. Paul Area Chamber	Minneapolis/Saint Paul	
Ken Johnson	President & CEO	St. Paul Port Authority (Partner Organization)	Minneapolis/Saint Paul	
Barbara Johnson	President & CEO	Greater New Orleans Inc	New Orleans	
Pres Kabacoff	CEO	Historic Restoration Incorporated (Partner Organization)	New Orleans	
John Hornbeck	President & CEO	Hampton Roads Chamber of Commerce	Norfolk/Newport News	
Bruce Bradley	Board Member and Former Co-Chairman	Hampton Roads Partnership	Norfolk/Newport News	President, Landmark Publishing Group
James Eason	President & CEO	Hampton Roads Partnership	Norfolk/Newport News	
Jim Babcock	Board Member, Treasury; Executive Committee Member	Retired Band Executive	Norfolk/Newport News	First Virginia Bank of Tidewater
Clyde Hoey	President & CEO	Virginia Peninsula Chamber of Commerce	Norfolk/Newport News	
Bob Gillett	President	Algonquin College	Ottawa	Member of TOP
Denzil Doyle	Chairman	Capital Alliance Ventures, Inc.	Ottawa	
Alf Chaiton	Senior Advisor to Mayor Bob Chiarelli	City of Ottawa	Ottawa	
Michael Murr	Acting Director, Business Development Branch	City of Ottawa	Ottawa	
Gail Logan	President	Greater Ottawa Chamber of Commerce	Ottawa	
Arthur Carty	President	National Research Council	Ottawa	Member of TOP
Carol Sage	Director, SmartCapital	Ottawa Center for Research and Innovation (OCRI)	Ottawa	
Cheryl Gorman	Executive Director, TalentWorks	Ottawa Center for Research and Innovation (OCRI)	Ottawa	
Jeffrey Dale	President & CEO	Ottawa Center for Research and Innovation (OCRI)	Ottawa	
Michael Darch	Executive Director, Global Marketing	Ottawa Center for Research and Innovation (OCRI)	Ottawa	
Paul Wilker	Executive Director, SmartCapital	Ottawa Center for Research and Innovation (OCRI)	Ottawa	
Chris Henderson	CEO	The Delphi Group	Ottawa	Chairman, OCRI; Member of TOP
Kirk Mandy	Co-Chair	The Ottawa Partnership (TOP)	Ottawa	Vice Chairman, Zarlink Semiconductor

Name	Title	Organization	Region	Other affiliation
John Claypool	Executive Director	AIA Philadelphia (Partner Organization)	Philadelphia	
Peggy Amsterdam	Executive Director	Greater Philadelphia Cultural Alliance (Partner Organization)	Philadelphia	
David Thornburgh	Executive Director	Pennsylvania Economy League (East)	Philadelphia	
Eric Rabe	Board Member	Pennsylvania Economy League (East)	Philadelphia	Vice President, Media Relations, Verizon
Gregg Melinson	Chairman of the Board	Pennsylvania Economy League (East)	Philadelphia	Partner, Drinker, Biddle & Reath, LLP
Diane Brossart	Board Member	Greater Phoenix Leadership	Phoenix	President, Valley Forward Association
Diane McCarthy	Board Member	Greater Phoenix Leadership	Phoenix	President, WESTMARC
Rick Weddle	Board Member	Greater Phoenix Leadership	Phoenix	President & CEO, Greater Phoenix Economic Council
Tom Browning	President	Greater Phoenix Leadership	Phoenix	
Rick Stafford	Former CEO	Allegheny Conference on Community Development	Pittsburgh	
Frank Horrigan	Director of External Relations	Innovation Works (Partner Organization)	Pittsburgh	
Steve Zylstara	President	Pittsburgh Technology Council (Partner Organization)	Pittsburgh	
Pam Wall	Executive Director	Greater Triangle Regional Council	Raleigh/Durham	
Harvey Schmidt	President & CEO	Raleigh Chamber	Raleigh/Durham	
Ted Abernathy	Executive Vice President	Research Triangle Regional Partnership	Raleigh/Durham	
Jim Roberson	Chairman Elect	Research Triangle Regional Partnership (Partner Organization)	Raleigh/Durham	President, Research Triangle Foundation
John Roberts	Executive Director	Civic Progress	Saint Louis	
Christine Chadwick	Executive Director	Focus St. Louis (Partner Organization)	Saint Louis	
Kathy Osborne	President & CEO	Regional Business Council	Saint Louis	
Richard Fleming	President & CEO	St. Louis Regional Chamber & Growth Association	Saint Louis	
Scott Grimes	Research Director	San Diego Dialogue	San Diego	
Andrew Michael	Vice President	Bay Area Council	San Francisco	
Sean Randolph	President	Bay Area Economic Forum	San Francisco	
Steve Leahy	President & CEO	Greater Seattle Chamber of Commerce	Seattle	

Name	Title	Organization	Region	Other affiliation
Mary Rowe	Coordinator, Ideas That Matter	Avana Capital Corporation	Toronto	
Alan Broadbent	Chairman & CEO	Avana Capital Corporation	Toronto	
David Crombie	President & CEO	Canadian Urban Institute	Toronto	
Rosanna Scotti	Director, Strategic and Corporate Policy/Healthy City Office	City of Toronto	Toronto	
Shirley Hoy	Chief Administrative Officer	City of Toronto	Toronto	
Anna Pace	Senior Corporate Management and Policy Consultant	City of Toronto	Toronto	
Frank Sorochinsky	President	George Brown Toronto City College	Toronto	
Dale Richmond	Board Member	Toronto Board of Trade	Toronto	Former President & CEO, OMERS
Rod Phillips	Board Member	Toronto Board of Trade	Toronto	President & CEO, Warren Sheppel Consultants Corp.
Elyse Allan	President & CEO	Toronto Board of Trade	Toronto	
Sara Lyons	Special Assistant to David Pecaut	Toronto City Summit Alliance	Toronto	
Ratna Omidvar	Board Member	Toronto City Summit Alliance	Toronto	Executive Director, The Maytree Foundation
David Pecaut	Chair	Toronto City Summit Alliance	Toronto	President & CEO, iFormation Group
Francis Lankin	President & CEO	United Way of Greater Toronto	Toronto	
Barney Savage	Senior Policy Advisor	United Way of Greater Toronto	Toronto	
Caroline Cunningham	Vice President, Regional Partnership	Greater Washington Board of Trade	Washington DC	
Robert Peck	President	Greater Washington Board of Trade	Washington DC	
Joseph Budzynski	CFO	Greater Washington Board of Trade	Washington DC	

APPENDIX E
– Introductory Letter –

Dear Ms. / Mr. _____,

I am pleased to invite you to participate in new, groundbreaking research that will strengthen and document the growing field of regional business-led civic organizations. These organizations range from metropolitan chambers of commerce; to more narrowly-based CEO only groups like my own organization here at Cleveland Tomorrow.

Our final product will track innovative practice among regional business-civic organizations in major metropolitan areas in the US and Canada: What works and doesn't work? What organizational changes are occurring? How do they affect our bottom-line? What contributions are we making to the health of our major metropolitan regions?

As a leader in the field, your valuable insight for this effort is critical. Staff from the Alliance for Regional Stewardship and FutureWorks will be contacting leaders like you to participate. They will ask you to conduct a phone interview and fill out a short survey. We will include you as a recipient of our final report and invite you to a project-ending forum. At the forum, top leaders in the field will convene to discuss implications and next steps.

The effort is sponsored by the Metropolitan Leadership Network, Committee for Economic Development, and Ford Foundation. Dick Fleming of the St. Louis Regional Chamber and I are co-chairing the advisory committee; a full committee roster is attached.

We both want to emphasize how important it is that you be candid and complete in your responses. Let's be honest – we hate surveys. But this project is important because it will help all of us in this crazy industry we call home. Our business constituencies are demanding and deserve new efficiencies and models. I know I need the results of this survey for decisions I'm facing now. I hope you feel the same and take your participation with sincerity.

Cordially,

Joseph Roman
Executive Director
Cleveland Tomorrow

Note: Since the time this research was conducted, Cleveland Tomorrow merged into the Greater Cleveland Partnership and Joseph Roman is its President and CEO.

APPENDIX F

– Interview Guide for “Executives” –

Organizational Context and Priorities

- 1) What are the major issues and challenges affecting the health of your region's economy?
- 2) Which regions do you compare your region to and why?
- 3) What are your organization's MOST important regional priorities today?
- 4) Please tell me a little more about TWO of the priorities that you listed in the previous question (with a focus on regional **civic** priorities), such as:
 - The level of your organization's involvement (lead, major partner, supporter)
 - Annual monetary investment by your organization
 - How your organization staffs and governs it (committee, staffing, Board involvement)
 - Major partners
 - Key challenges and successes
 - Measurable outcomes
- 5) What do you consider your organization's major achievements in the last three years?

Organizational Position within the Regional Business-Civic Landscape

- 6) Please tell us about other business-led organizations in your area that are regional in nature and not single-purpose (e.g., do not include single purpose organizations such as CEOs for education, business leaders for the environment, business committee for the arts, etc).
- 7) How do you differentiate your organization's role from other regional business-led organizations in your metropolitan area?
- 8) Do other types of organizations compete with your organization for the attention of business leaders in the region (e.g. MPOs, single-purpose leadership groups, government agencies)?
- 9) Has your organization recently merged with or taken over another business-led or multi-sector organization in your region?
- 10) *If yes:* With which organization(s) did you merge or take over? What were the reasons for the merger or take over?
- 11) Is your organization considering merging with or taking over another business-led or multi-sector organization?
- 12) *If yes:* With which organization(s) are you considering a merger or take over? What are the reasons for the merger or take over?

Regional Business Leadership

13) Think about the **level of attention given and time spent by top business leaders (CEOs or near CEOs) on regional civic issues**. On a scale from 1 to 5, with 1 meaning a very low level of attention and time spent and 5 meaning the highest level of attention and time spent, please rank the level of attention and time spent on civic issues by top business leaders in your region today versus five years ago.

	Level of attention given and time spent by business leaders on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14) *If there is a difference between the two ratings:* Why would you say there is a difference in the attention and time spent by top business leaders now versus five years ago? What are the implications for your organization?

15) Think about the **level of cooperation/quality of communication among business leadership** today versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of cooperation and 5 meaning the highest level of cooperation, please rank level of cooperation in your region today versus five years ago.

	Level of cooperation/quality of communication among business leadership				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16) *If there is a difference between the two ratings:* Why is there a difference in the level of cooperation and quality of communication among business leadership now versus five years ago? And, are there any implications for your organization?

17) Think about the **level of business influence on regional civic issues** now versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of influence and 5 meaning the highest level of influence, please rank the level of business influence on civic issues in your region today versus five years ago.

	Level of business influence on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18) *If there is a difference between the two ratings:* Why do you think there is a difference in the level of business influence on regional civic issues now versus five years ago?

National Participation in the Field

19) What organizational learning and benchmarking activities do you and your organization participate in on a regular basis?

- Leadership tours to other regions
- Benchmarking against other organizations or best practices
- National learning networks
- Other (please specify)
- Do NOT participate in these practices on a regular basis

20) List the national meetings, forums, and peer learning exchanges in your field in which you participate on regular basis.

21) Who are leaders in your profession from other regions and on a national level who you look to for advice or respect as a forward thinker in the field? (*Name up to three regional leaders and three national leaders.*)

Membership

22) Has there been a significant change in the make-up of your membership base over the last five years (since 1998)?

23) *If yes:* How would you characterize the changing make-up of your membership base (over the last five years)? How have these changes impacted your organization?

Budget

24) As you position your organization over the next three years, how do you see the make-up of your revenue changing if at all?

25) What are the challenges and opportunities to grow new revenue (or sustain current revenue) in your region's economic, institutional and political context?

APPENDIX G
– Interview Guide for “Board Members” –

Organizational Context and Regional Civic Issues

- 1) What is your role as a Board Member of [*name of regional business civic organization*]?
- 2) How long have you been a member of the Board of Directors?
- 3) What are the Board and [*name of regional business civic organization*] highest priorities right now?
- 4) Have these priorities changed since three years ago? If so, how and why?
- 5) What have been [*name of regional business civic organization*] major achievements in the last three years?
- 6) Currently, what are your organizations’ major projects or initiatives?
- 7) What is the Board’s overall role in a project or initiative? That is, how much management or involvement does the Board have with a typical project?
- 8) What strengths does your organization bring to policy and program initiatives in the region?
- 9) Are there any challenges that your organization faces in advancing policy and program initiatives in the region?

10) The following is a list of six regional civic issues. How **important** is each one in your organization's agenda? Rate the importance of each issue, using a scale from 1 to 5, where "1" = Not At All Important and "5" = Very Important. Let me know if an issue is not relevant or applicable to your organization, or you don't know.

Importance rating: 1 = Not at all important
 2 = Somewhat unimportant
 3 = Neither important nor unimportant
 4 = Somewhat important
 5 = Very important

Regional Issue	Importance (rate 1 to 5)
1. Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues.	
2. Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)	
3. Smart growth, sprawl, environmental, and regional land use issues.	
4. Workforce development and education issues	
5. Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization)	
6. Economic development (e.g., business retention and recruitment)	

11) The following is a list of regional civic issues from. How **effective** has your organization been in influencing change on these issues? Rate your organization's effectiveness using a scale from 1 to 5, where "1" = Not At All Effective and "5" = Very Effective. Let me know if an issue is not relevant or applicable to your organization, or you don't know.

Effectiveness rating: 1 = Not at all effective
 2 = Somewhat ineffective
 3 = Neither effective nor ineffective
 4 = Somewhat effective
 5 = Very effective

Regional Issue	Effectiveness (rate 1 to 5)
1. Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues.	
2. Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)	
3. Smart growth, sprawl, environmental, and regional land use issues.	
4. Workforce development and education issues	
5. Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization)	
6. Economic development (e.g., business retention and recruitment)	

Regional Business Leadership

- 12) Think about the **level of attention given and time spent by top business leaders (CEOs or near CEOs) on regional civic issues**. On a scale from 1 to 5, with 1 meaning a very low level of attention and time spent and 5 meaning the highest level of attention and time spent, please rank the level of attention and time spent on civic issues by top business leaders in your region today versus five years ago.

	Level of attention given and time spent by business leaders on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 13) *If there is a difference between the two ratings:* Why would you say there is a difference in the attention and time spent by top business leaders now versus five years ago? What are the implications for your organization?

- 14) Think about the **level of cooperation/quality of communication among business leadership** today versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of cooperation and 5 meaning the highest level of cooperation, please rank level of cooperation in your region today versus five years ago.

	Level of cooperation/quality of communication among business leadership				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 15) *If there is a difference between the two ratings:* Why is there a difference in the level of cooperation and quality of communication among business leadership now versus five years ago? And, are there any implications for your organization?

- 16) Think about the **level of business influence on regional civic issues** now versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of influence and 5 meaning the highest level of influence, please rank the level of business influence on civic issues in your region today versus five years ago.

	Level of business influence on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 17) *If there is a difference between the two ratings:* Why do you think there is a difference in the level of business influence on regional civic issues now versus five years ago?

APPENDIX H

– Interview Guide for “Partners” –

Organizational Context

- 1) What is your organization’s mission and whom does it serve?
- 2) What are the major issues and challenges affecting the health of the region’s economy today?
- 3) How would you characterize your organization’s relationship with *[name of regional business-led civic organization]*?
- 4) How many years has your organization been involved or partnered with *[name of regional business-led civic organization]*? Why did your organization become involved or begin its partnership with *[name of regional business-led civic organization]*?

Regional Civic Issues

- 5) On which regional civic issues has your organization worked closely with *[name of regional business-led civic organization]*? Please list a few of them.
- 6) What strengths does the regional business-led civic organization bring to these regional civic issues?
- 7) What have been the challenges of working with *[name of regional business-led civic organization]* on these issues?

- 8) From your perspective, how **important** are the following regional civic issues to *[name of regional business-led civic organization]*'s agenda? Rate the importance of each issue using a scale from 1 to 5, where "1" means Not At All Important and "5" means Very Important. You can also let me know if you think an issue is not relevant, applicable, or you don't know.

Importance rating: 1 = Not at all important
 2 = Somewhat unimportant
 3 = Neither important nor unimportant
 4 = Somewhat important
 5 = Very important

Regional Issue	Importance (rate 1 to 5)
7. Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues.	
8. Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)	
9. Smart growth, sprawl, environmental, and regional land use issues.	
10. Workforce development and education issues	
11. Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization)	
12. Economic development (e.g., business retention and recruitment)	

- 9) From your perspective, how **effective** has the *[name of regional business-led civic organization]* been in influencing change on these issues? Rate the effectiveness using a scale from 1 to 5, where "1" means Not At All Effective and "5" means Very Effective. You can also let me know if you think an issue is not relevant, applicable, or you don't know.

Effectiveness rating: 1 = Not at all effective
 2 = Somewhat ineffective
 3 = Neither effective nor ineffective
 4 = Somewhat effective
 5 = Very effective

Regional Issue	Effectiveness (rate 1 to 5)
7. Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues.	
8. Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)	
9. Smart growth, sprawl, environmental, and regional land use issues.	
10. Workforce development and education issues	
11. Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization)	
12. Economic development (e.g., business retention and recruitment)	

Regional Business Leadership

- 10) Think about the **level of attention given and time spent by top business leaders (CEOs or near CEOs) on regional civic issues**. On a scale from 1 to 5, with 1 meaning a very low level of attention and time spent and 5 meaning the highest level of attention and time spent, please rank the level of attention and time spent on civic issues by top business leaders in your region today versus five years ago.

	Level of attention given and time spent by business leaders on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 11) *If there is a difference between the two ratings:* Why would you say there is a difference in the attention and time spent by top business leaders now versus five years ago? What are the implications for your organization?

- 12) Think about the **level of cooperation/quality of communication among business leadership** today versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of cooperation and 5 meaning the highest level of cooperation, please rank level of cooperation in your region today versus five years ago.

	Level of cooperation/quality of communication among business leadership				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 13) *If there is a difference between the two ratings:* Why is there a difference in the level of cooperation and quality of communication among business leadership now versus five years ago? And, are there any implications for your organization?

- 14) Think about the **level of business influence on regional civic issues** now versus five years ago. On a scale from 1 to 5, with 1 meaning a very low level of influence and 5 meaning the highest level of influence, please rank the level of business influence on civic issues in your region today versus five years ago.

	Level of business influence on regional civic issues				
	1 - Very low	2 - Somewhat low	3 - Neither low nor high	4 - Somewhat high	5 - Very high
Today (2003)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 years ago (1998)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 15) *If there is a difference between the two ratings:* Why do you think there is a difference in the level of business influence on regional civic issues now versus five years ago?

APPENDIX I
– Web-based Survey for “Executives” –

Organizational Type

- 1) **What is the name of your organization?**
- 2) **Which of the following best describes your organization?**
 - Exclusively led by employers, business leaders, etc.
 - Primarily (but not exclusively) led by employers, business leaders, etc.
 - Multi-sector: Led by clear partnership of business, government, civic, community and/or other leaders
 - Other type of organization

Staff and Board

- 3a) **Currently (2003), how many full-time equivalent (FTE) employees or staff members does your organization employ?**
- 3b) **One year ago (2002), how many full-time equivalent (FTE) staff members did your organization employ?**
- 3c) **Five years ago (1998), how many full-time equivalent (FTE) staff members did your organization employ?** (Skip this question if your organization did not exist five years ago.)
- 4) **How many full-time equivalent (FTE) staff members fit into each of the following personnel categories?** (Provide number of staff members for each category.)
 - Executive Management/Administrative
 - Services
 - Membership
 - Policy and Research
 - Communication
 - Other operational category
- 5) **What is your organization's key decision-making governing body (e.g., the functional body in your organization that makes key organizational decisions such as regional projects to get involved in, policy initiatives to pursue, etc.)?**
 - Full Board of Directors
 - Executive Board of Directors
 - Full membership
 - Executive staff
 - Other governing body
- 6) **How many members are on your Board of Directors?**

Company/Individual Membership

- 7) **What is the key unit of membership for your organization?**
- Company/organization
 - Individual
 - Equal representation of both types of members
- 8a) **Currently (2003), how many members does your organization have?**
- 8b) **Five years ago (1998), how many members did your organization have?** (Skip this question if your organization did not exist five years ago.)
- 8c) **If there has been an increase or decrease in membership compared with five years ago, what are the primary reasons for this change?** Select all that apply. (Skip this question if your organization did not exist five years ago.)
- Change in the overall economy
 - Changes at the business level (e.g., restructuring of business or change in type of leadership)
 - Change in the organization's mission/renewed focus
 - Other organizations emerging/folding (change in the competitive landscape)
 - New services or programs provided by the organization
 - Other
 - Don't know
- 9) **What is the estimated breakdown of your membership base by size of company?** (Please provide an estimated percentage for each. Answers should sum to 100.)
- Small companies (Less than 100 employees)
 - Medium-sized companies (100 to 500 employees)
 - Large companies (More than 500 employees)
- 10) **What methods does your organization use to calculate the annual dues or fees expected by company/individual members?** Select all that apply.
- Flat fees, dues or contributions
 - Number of company employees
 - Company revenue/profitability
 - History of company in community
 - Other
 - Don't know
- 11a) **What are the average annual dues paid by the largest members of your organization (the largest being defined as the 10% of your membership base with the largest revenue)?**
- 11b) **What are the average annual dues paid by the smallest members of your organization (the smallest being defined as the 50% of your membership base with the smallest revenue)?**

12) **What do you think current members see as the top TWO benefits to being a member of your organization?** (Please select up to two.)

- Advocacy on public policy issues
- Business services (e.g., healthcare, insurance, training)
- Business contacts/networking/new business
- Voice in the regional business-civic arena
- Leadership development opportunity for key staff
- Avenue to give back to the community/participate in civic issues
- Other

Organizational Budget

13) **What is the total compensation package for each category of your organization's executive staff?** (Choose one: Less than \$75,000; \$75,000 to less than \$125,000; \$125,000 to less than \$175,000; \$175,000 to less than \$225,000; \$225,000 to less than \$275,000; \$275,000 or more; Don't know)

- President/CEO/Executive Director
- #2 Executive (e.g., COO, Deputy, VP)
- Staff/Group Directors

14a) **Currently (2003), what is your organization's annual operating budget?** (Choose one: Less than \$500,000; \$500,000 to less than \$1 million; \$1 million to less than \$2 million; \$2 million to less than \$5 million; \$5 million or more; Don't know)

14b) **Five years ago (1998), what was your organization's annual operating budget?** (Choose one: Less than \$500,000; \$500,000 to less than \$1 million; \$1 million to less than \$2 million; \$2 million to less than \$5 million; \$5 million or more; Don't know) (Skip this question if your organization did not exist five years ago.)

14c) **If your organization's budget increased OR decreased since five years ago (1998), please explain the major reasons for this change.** (Skip this question if your organization did not exist five years ago.)

15a) **Over the next two years, do you expect your organization's budget to increase, stay the same or decrease?**

15b) **Why do you think your organization's budget will increase by more than 10% over the next two years?** (This question may not apply.)

15c) **Why do you think your organization's budget will decrease by more than 10% over the next two years?** (This question may not apply.)

16) **What are your organization's sources of revenue by percent share (of total revenue)?**
(Please provide an estimated percentage for each of the following categories. Percentages should sum to 100.)

- Membership dues
- Member events, publications and other member services
- Contracts (e.g., government, foundations)
- Contributions from the for-profit sector
- Investments
- Other

Regional Issues

17a) **Rate the following regional civic issues on how important each one is in your organization's agenda. Use a scale from 1 to 5, where 1 = Not At All Important and 5 = Very Important.**

- Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues
- Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)
- Smart growth, sprawl, environmental and regional land use issues
- Workforce development and education issues
- Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization, etc.)
- Economic development (e.g., business retention and recruitment)

17b) **Rate the following regional civic issues on how effective you feel your organization has been in influencing change on these issues. Use a scale from 1 to 5, where 1 = Not At All Effective and 5 = Very Effective.**

- Multi-sector regional collaboration, regional governance and/or multi-jurisdictional cooperation issues
- Specific regional infrastructure issues (e.g., public transit, transportation, wastewater, energy and technology, etc.)
- Smart growth, sprawl, environmental and regional land use issues
- Workforce development and education issues
- Economic and social equity (e.g., equitable regional development, social inclusion and poverty alleviation, downtown revitalization, etc.)
- Economic development (e.g., business retention and recruitment)