

The Most Powerful Name in Corporate News

Small and Large Research Studies



Dr. Lorie A. Sousa
CEO

CEOCFO: Dr. Sousa, what is the concept behind COREducational?

Dr. Sousa: COREducational is a consulting company. We basically conduct small and large research studies. I work mostly in the domain of education and somewhat in marketing research as well. We take data and turn it into usable information and provide reports to organizations that help them with their decision making. In addition to that, we recently started doing some app design and development and released an app called Smartenfit and that app just came out about two weeks ago. It is a companion app for a book that a colleague of mine wrote on healthier habits and wellness.

CEOCFO: What do you understand about designing research and using data that perhaps others do not? How do you know what to look for and what metrics to check?

Dr. Sousa: I received my PhD in Social Psychology with an emphasis on social research at UC Riverside in 2001 and that education gives you a very strong background in research and statistics. This knowledge can be applied in many different domains. The foundation is in research methods and it is something that I teach now. I also teach an online class at Rutgers University in Research Methods. What you are taught in graduate school is how to be very systematic in your approach to capture as many different kinds of data that you can to take a broader approach and a big picture approach. If you only take one slice of data that can lead to some misunderstandings of what is really going on. I think that my background prepared me to be very methodical in my work and to collect many different data points and to work with the data in such a way

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so that I can answer the questions that my customers are interested in regard to what is going on in their organization.

CEOCFO: *What is an example of a client that you worked with and what you added to the mix that people would find makes a difference?*

Dr. Sousa: I think that I am often in the position of being the protector of the evaluation, so I sometimes feel like I have to be the guardian of the data and how it is collected. That is always something that is really important to me because there is a lot that can happen in the course of collecting data that can actually taint it and make it difficult to see what is really going on. My job is to make sure that the data is collected in a way that is accurate, clean, and does not bias the data collected and what information we get back from the respondents whether they are students, teachers, or folks outside the grocery store. The way in which you collect data is really important and I think that is something that, unless you have the training, you would not necessarily think of. The reliability and the validity of the data is very important because if it is faulty, the conclusions you are drawing from the data are worthless and they are not going to be helpful to you at all. I think my role is to make sure that the data collection is done properly, the design is appropriate to the questions that you are trying to answer, and things are clean so then when you do draw conclusions, you are comfortable and confident that the information that you are getting is as accurate as possible.

CEOCFO: *When you are devising a study, do you have an idea of what you are going to find?*

Dr. Sousa: Generally, if I have worked in that domain before, I have a good sense of what I am going to find, but oftentimes I am removed from the ground floor, so if it is something like an evaluation of a reading program at a school district, I am not physically there on the school site. I do not necessarily know about leadership changes that have been going on in the district or new policies that have occurred within that school. I do get surprised on occasion and it is actually a good thing sometimes to have that separation because then you are not really reading into things or looking for certain things; you are just looking at what the data is telling you and then going back to the client and talking to them about what you are seeing. There might be many reasons why you are seeing something, so let us talk about some potential things it might be. For example, I had a literacy project that I worked on for multiple years. In the third year, I looked at several grade levels and I looked at student test scores over time. I went as I normally did out to this school district in the fall and I told them I looked at their data from the previous year and there is something really interesting going on at their kindergarten level. At three of six schools in the district, test scores just went through the roof and there were increases beyond anything I had ever seen, but the other three schools were still doing how they had done in previous years. I said they needed to find out what these three schools were doing and try to duplicate it because they had huge increases in their scores at this level. They all chuckled a little bit and said that those were the three schools that went from half-day kindergarten to full-day kindergarten. The students had more instructional time, it was not something necessarily that they passed on to me but we can make that connection when we looked that the data. It was so obvious that there was something going on at those three schools. They were eventually able to use that data to convince their school board to increase the other three schools to full-day kindergarten as well. So, I can usually predict what I'm

going to see but sometimes I cannot and sometimes it is a really nice surprise.

CEOCFO: *Would you tell us more about the Smartenfit?*

Dr. Sousa: Smartenfit came together about a year ago when a good friend of mine from my graduate program, Dr. Charlotte Markey contacted me and said she had written a book called Smart People Don't Diet. She is a health researcher at Rutgers University and her book was going to be coming out at the end of 2014. She asked if I would be interested in developing a companion app with her because I had developed some relationships with app developers and knew something about technology in terms of mobile app development. When she said that, I jumped at the chance because I had wanted to do this for a long for a long time. I have always been interested in technology and use of mobile apps for educational purposes in particular. I jumped at the chance but I knew that we needed a technical person as well. There was another friend that we went to graduate school with, Dr. Jennifer Van Reit that I immediately thought of. Even though we all got the same degree, Charlotte ended up as a health psychologist, I am a social psychologist and Jennifer is a cognitive psychologist. She has more of a background in the development of technology. Jen is an expert in user experience and mobile innovation and has worked at many companies in Silicon Valley such as Yahoo, Microsoft, and Intuit. She has a really good background in how to create flows and evaluating the user experience to make it very enjoyable and user friendly. We brought her in as well and we looked at the book, went through it and wanted to make sure that we developed an app that could be a standalone and could also be well aligned with the book itself. Since the book is based on decades of health research, we wanted every component in the app to have a very strong research emphasis. For example, we have a news feed with tips and inspiration because the research says that motivation is really important to increase perseverance and help people stay on track when they are trying to maintain their weight or lose weight. We have notifications and reminders because the research says that feedback and reinforcement is really important to increase adherence to good habits. We have a goal setting feature that allows people to set goals in multiple domains including wellness type goals like doing a good deed or things like exercise, eating habits like drinking less soda etc. There are goals that are already in there and there are goals they can add and customize as well, because the research says that the more specific we are and the more we operationalize our goals, the more likely we are to achieve those goals. We have what I think is going to be the feature that people are most excited about and it is called the Healthier Options database. It has healthy alternatives to favorite foods, so you might type in hamburger and ice cream and it will give you at least three alternatives of healthier options. Personally, I get sort of fatigued about making some of those decisions and you can only eat salmon so many times. So the database gives the user ideas and options. This was a really big undertaking and we needed to hire registered dieticians and have people who really had a knowledge of nutrition develop that database, create it and make sure there were truly healthier options in there. We chose to do this because we wanted to provide channels and pathways for people to make better choices because if you remove barriers and obstacles, people are more likely to make better healthier decisions. This is also well established in the research. We have a dashboard for tracking and monitoring. We have a photo food diary that you can take pictures of your foods and it puts them in a collage by day and by week for

monitoring purposes because the research suggests that getting feedback and reinforcement is helpful when you are trying to stay on track and there is a really strong literature about that. Every component we have in the SmartenFit app is research-based. We are researchers and academics so we feel very strongly about having an evidenced-based product because there is a lot of advice out in the health, fitness, and wellness world that is not necessarily backed by research.

CEOCFO: *How do you get attention with so many new apps out?*

Dr. Sousa: I think that we have a couple of advantages. One is that it is connected with the book. We have our QR code on the book. My colleague Dr. Charlotte Markey is on a book tour, so she is going to be out there a lot talking about the book, which is going to be a way for people to be introduced to SmartenFit. I do not think we are the kind of company that is trying to push anything on anyone that they do not want. I think we just want to provide the information and make sure people know what we are about, what our message is, and then they can draw their own conclusions about whether it is the right app for them. We can differentiate ourselves in a couple of ways. One is that we are very research-focused. The second is that it is a more holistic and macro approach to health and fitness. There is a lot of research out there says counting calories and steps is not sustainable for most people and that in some cases, it might be counterproductive in many ways because it can trigger an obsession with weight loss, that can be unhealthy for some. We are not trying to be an app that does those things. There are plenty of apps on the market that count your calories and do all of that. The research that we have investigated suggests that when you take a more macro or holistic approach to things and you are not trying to count every single calorie, you can make little discreet changes and choices that can be sustainable and can improve your health significantly. I think that is maybe where we differentiate ourselves and now it is just a matter of getting out there, letting people know about it and hopefully we do a good enough job that we get good reviews and good feedback and it grows from there.

CEOCFO: *What is next for COREducational and for you?*

Dr. Sousa: I am going to continue doing my work as a data scientist and evaluator. I love working in the field of evaluation and research and that is important to me but I think there are many opportunities that may grow from Smartenfit. I think it is a brand that can grow in many different directions. Charlotte may write additional books. She has an interest in young women's health and body image and we have talked about the idea of doing an app that is geared more towards young women and is more based on increasing self-esteem and self-worth. We have other ideas and I have a notebook full of ideas for educational apps since that is the field that I have worked in for the last ten years. I think it could go in many different directions and I am feeling very positive about how things have gone this last year.

CEOCFO: *What should people remember about COREducational?*

Dr. Sousa: I think that we are an organization that is committed to going above and beyond for all of our clients. We do not just want to meet expectations; we want to exceed them. Part of that is getting to know them and knowing what their needs are, so forming that relationship has always been the thing that we have been strongest at, forming those relationships and letting clients know that we are in it with them. We are

working with them to increase their understanding of the organization and what is going so that they can meet their funding requirements in addition to giving them the answers they need to make good decisions.

