

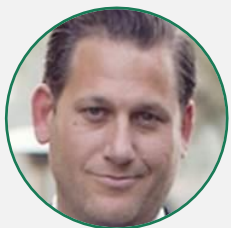


Creating a compelling student experience in a full or partially remote model

ICFNJ Presidents Webinar

AUGUST 2020

Quick introduction to your presenters



Sacha Litman

Partner and Associate
Director

- Core member of Education Practice
- Deep experience with higher education institutions, particularly private universities
- Expertise in analytics to improve enrollment, financial sustainability and outcomes
- Expertise in pricing, financial aid allocation, income sharing and alternative loans



Jack Liu

Principal

- Core member of the retail and consumer practice
- Significant work in optimizing remote learning during COVID - particularly around connectivity, devices, cost of service, and private sector partnership strategy
- Co-authored BCG and Common Sense Media's report on Bridging the Digital Divide in Education during COVID



Meghan McQuiggan

Lead Knowledge
Analyst

- Research lead for Education, Employment, and Welfare practice
- Has supported clients across early childhood, K-12, higher education, vocational education, and digital education
- Conducting extensive COVID-19 benchmarking of educational institutions, including college and university re-opening operations



Aaron Wilson

Managing Director
and Partner

- Board member ICFNJ
- Partner in the New Jersey office and focuses primarily on supporting retail clients across a variety of topics
- Retail transformation experience focused on Merchandising strategy and vendor funding; indirect spend / GNFR optimization; franchise strategy; omnichannel strategy

BCG's Education Practice supports college & university presidents and state partners in COVID strategy



COVID Experience

100+ HEIs in cohorts and individually in 10 states



Topics We Cover

We have supported

- Testing
- Tracing
- Procurement
- Virus monitoring
- Maximizing student experience & behavioral compliance
- Faculty confidence
- Communications
- Governance decisions roles & framework
- State guidelines

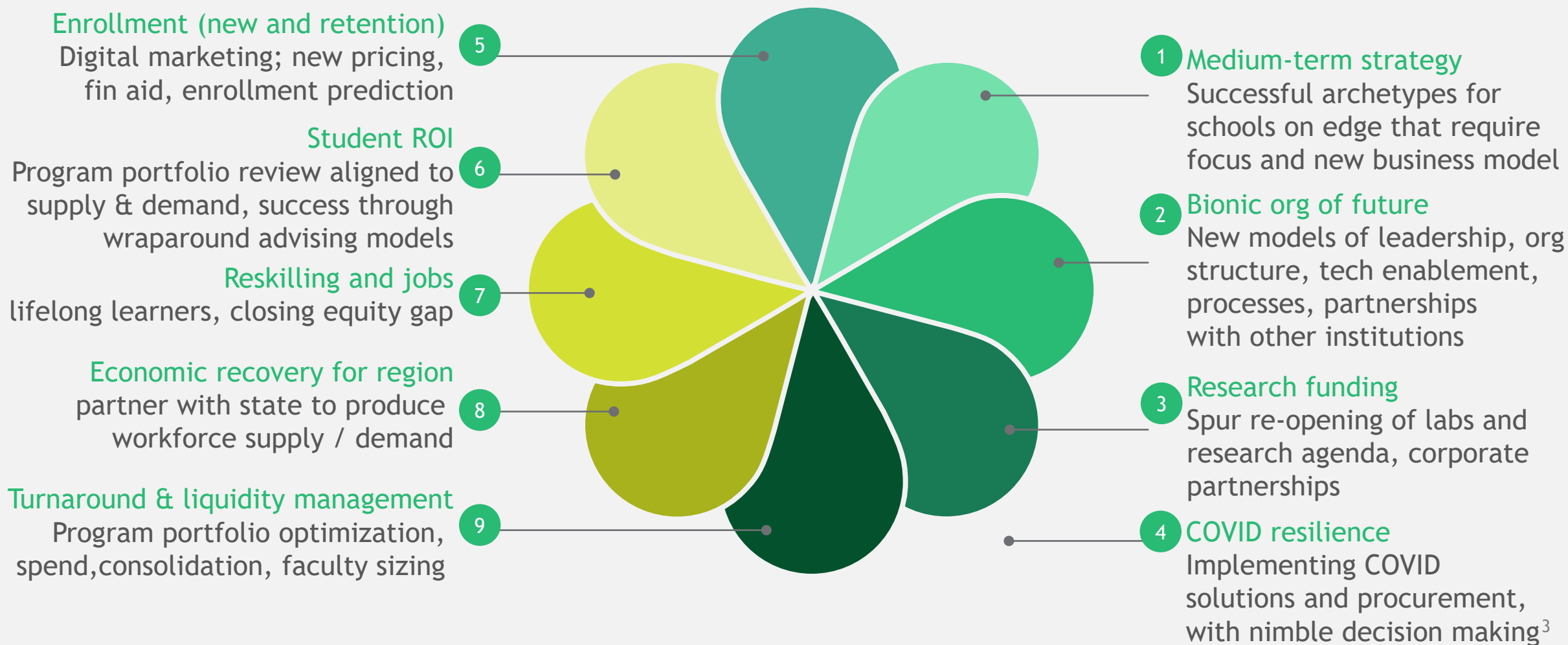


Spectrum of Services

from least to most involved

- **National**
 - ✓ BCG HEI Round Tables
- **ICFNJ specific**
 - ✓ Webinars on topics selected by Presidents
 - ✓ Control tower dashboards, student exper. surveys
 - Shared services in tracing, testing, etc
- **Individual HEIs**
 - Support on topics

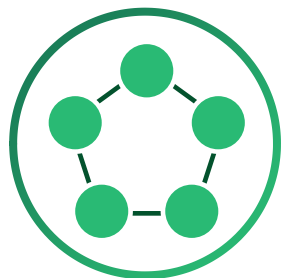
Some of the questions we are helping higher ed address over this coming academic year



Our work in higher education spans leading institutions and intermediaries, and from small privates to large publics



BCG supports higher ed institutions and intermediaries across a variety of topics



Strategy development



Student success



Organizational effectiveness



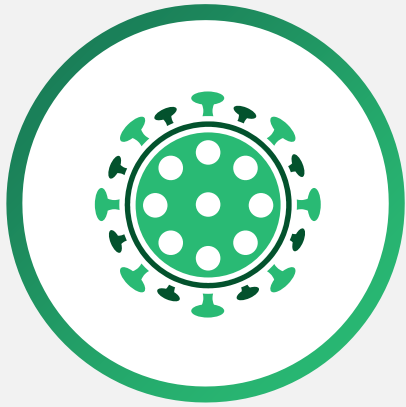
Operational excellence



Online learning / digital transformation



Goal: how to maximize student experience and behavioral compliance within COVID health guidelines?



Minimize health risks

Majority of universities' focus and investment to date has been on COVID restrictions



Maximize on campus student experience

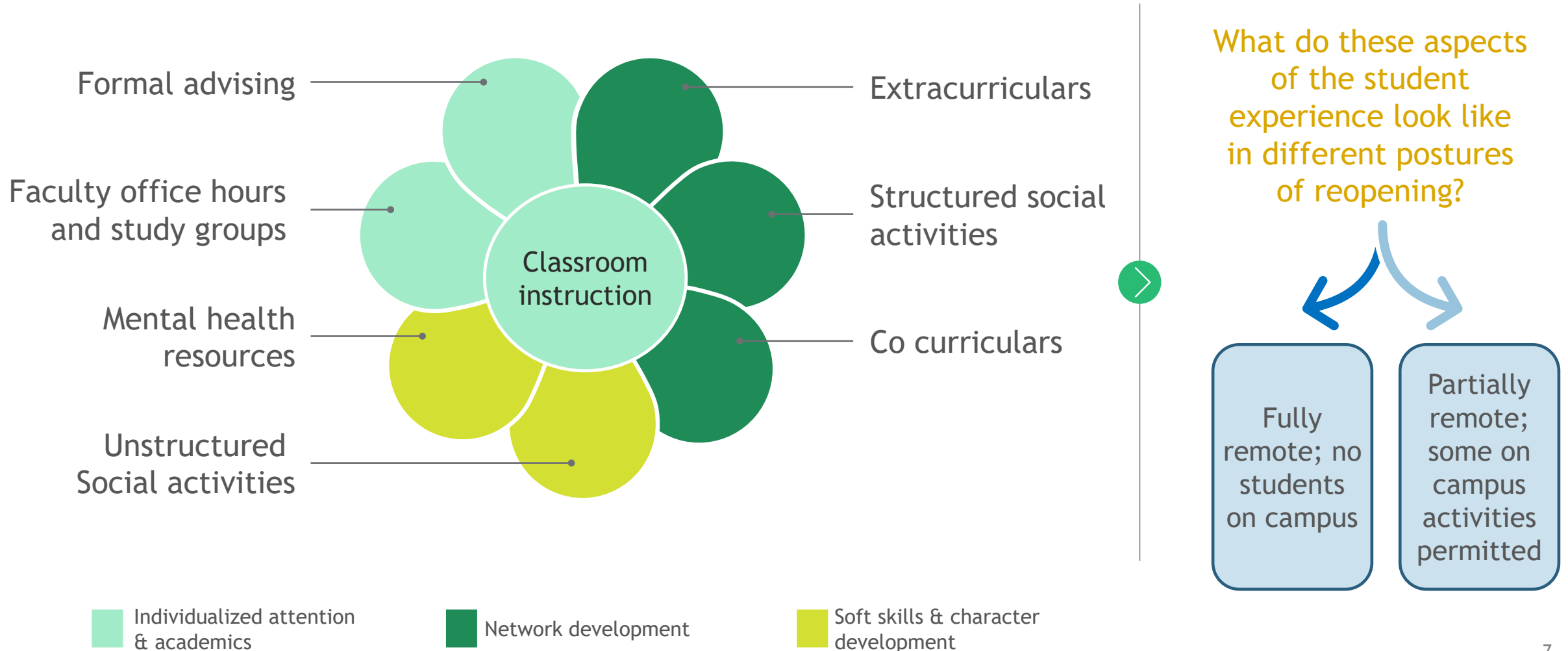
Students will only remain on campus and uphold restrictions if value proposition benefits outweigh the costs



Achieve behavioral compliance

Attention now turning to how ensure COVID restrictions are upheld

Student experience | encapsulates more than just classroom instruction; important to consider impact of reopening plan across all student dimensions



Is the value proposition
of a private education
at risk of being
undercut by
community & national
online colleges?










Private Colleges

- ↑ Traditional student experience
- Untested remote value proposition

Community and Online Colleges

- ↑ Less expensive
- ↑ Experience with remote instruction

Assessing the risk | aspects of CCs and online universities Fall 2020 offerings that could threaten private college value proposition if online as well

 <p>Low risk High risk</p>		Community colleges		National online colleges	
Components of Student Experience Value Prop.		Example Fall 2020 offering	Risk to "remote" private college value prop.	Example Fall 2020 offering	Risk to "remote" private college value prop.
Individualized attention & Academics (Classroom instruction, formal and informal advising)		<ul style="list-style-type: none"> Majority remote instruction; <u>synchronous & asynchronous remote</u> Majority remote advising 		<ul style="list-style-type: none"> Fully remote instruction; <u>synchronous & asynchronous classes</u> Increasing on-demand remote advising availability 	
Network development (Extra curriculars, co curriculars, Structured social activities,)		<ul style="list-style-type: none"> Majority <u>remote or cancelled extracurriculars</u> Exceptions for select outdoor sports 		<ul style="list-style-type: none"> Few institutions have established <u>online "student centers"</u> with fully remote clubs 	
Soft skills & character development (Unstructured social activities, mental health)		<ul style="list-style-type: none"> Limited offerings if any 		<ul style="list-style-type: none"> No offerings 	

Discussion| how can private colleges craft their remote student experience to ensure value add relative to community and online colleges?

School opening posture		
	Fully remote	Partially remote
Individualized attention & academics	<ul style="list-style-type: none">Synchronous & asynchronous remote instructionRemote advising1:1 weekly professor video calls	<ul style="list-style-type: none">Synchronous & asynchronous remote instructionLimited in-person instruction to critical subjects (labs, arts)Remote advising1:1 weekly professor office hours
Network development	<ul style="list-style-type: none">Limited extracurriculars in remote settingAthletics allowed in exceptionsSponsored small group virtual dinnersVirtual employer/club info session	<ul style="list-style-type: none">Limited extracurriculars in remote settingOutdoor athletics allowedSponsored small group outdoor dinnersSmall group visits to employers, small group club meetings
Soft skills development	<ul style="list-style-type: none">Mental health resources available to all students'Student experience' fund to encourage virtual gatherings	<ul style="list-style-type: none">Mental health resources available to all studentsSafe, outdoor space provided to host spontaneous small group gatherings

Experience offering:	Example table stakes	Potential value add/ differentiator
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Technology is a key enabler to chosen remote student experience offerings...

Classroom Instruction

Critical to get remote class room instruction 'right'

Transition to remote education in Spring 2020 highlighted pain-points with remote instruction

- Student perspective: dissatisfaction with classroom experience and ability to engage
- Professor perspective: challenges with sensing student's understanding and engagement

Robust landscape of "Learning Management Systems" available to facilitate instruction



All other aspects of student experience

Student advising technology applied to other aspects of the student experience is limited

- Formal advising is the exception; can this be leveraged for other aspects of the experience?

Given lack of established platforms, important for institutions to be creative in leveraging resources

- Potential for classroom LMS solutions to be "repurposed" for other extracurricular programs
 - E.g., creating pages for clubs within Google Classroom
- Potential to leverage other social enablers to creatively engage with students
 - E.g., Instagram photo competition



...as well as student's behavioral compliance with COVID protocols

Enforcement

- Add requirements to existing student **codes of conduct** for adherence to COVID protocols; if violated, could result in suspension/expulsion
- Issue new **student behavior contracts** that students are required to sign; draw clear lines between what's **required** and what's **recommended**
- Impose harsh **penalties for violating** public health / social distancing guidance
- **Revoke status of campus groups that violate** rules, e.g. social probation
- Enhance relationship and **cooperation with local police departments and landlords** to enforce public health violations off campus

Incentives

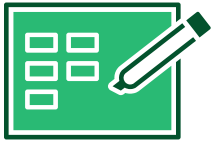
- Hire **student ambassadors to encourage distancing**, mask wearing, etc.
- Partner with **campus social media influencers** to celebrate and behavioral norms, "make them cool"
- Use **campaigns on education** and civic responsibility as incentive to follow guidelines, in lieu of stricter punishment
- Introduce **points system** to reward compliance
- Make clear to students, through enhanced data transparency, virus **presence on-campus and in community** (NOVID app shows degrees of separation)
- Launch **public health ad campaign**, e.g. those aimed at smoking, drug use, etc

This presentation is guidance only. It does not constitute medical or safety advice, nor is it a formal endorsement or recommendation of a particular response.

Resources to facilitate remote student experience offering

For your consideration | available strategies that NJ colleges could deploy to address student experience and drive continuous improvement

- 1 Community of practice sharing ideas of "what works" with ICFNJ peers



Virtual discussion & project management board ("Trello")

Facilitate dialogue & knowledge sharing of emerging practices for student experience & behavioral compliance

- 2 Student sentiment survey & key questions



Pulse survey on "New Normal Predictors" to understand reactions to student experience

Properly designed indicators can help predict behavioral compliance; critical in highly dynamic COVID environment

Leading vs. lagging indicator

- 3 Dashboard on virus and student experience



"Birds eye" view to assess most important decision metrics on student behavior, employee experience, and virus progression

Dashboard facilitates rapid decision making

Critical for institutions to test and learn during COVID reopening; fail fast and reassess strategy

Battery of survey questions created



Student Experience

- Overall experience, **net promoter score**
- Value from components of **face to face experience**
- Value from components of **remote experience**
- Frequency of participation in aspects of unstructured student experience



Behavioral Compliance

- **Habits formed** around COVID guidelines (eg., mask wearing)
- **Friends' behaviors** around guidelines
- **Situations avoided** where observe lack of compliance

Student survey | Students may struggle to accurately predict mask adherence when asked "head on", but triangulation through New Normal Predictors helps

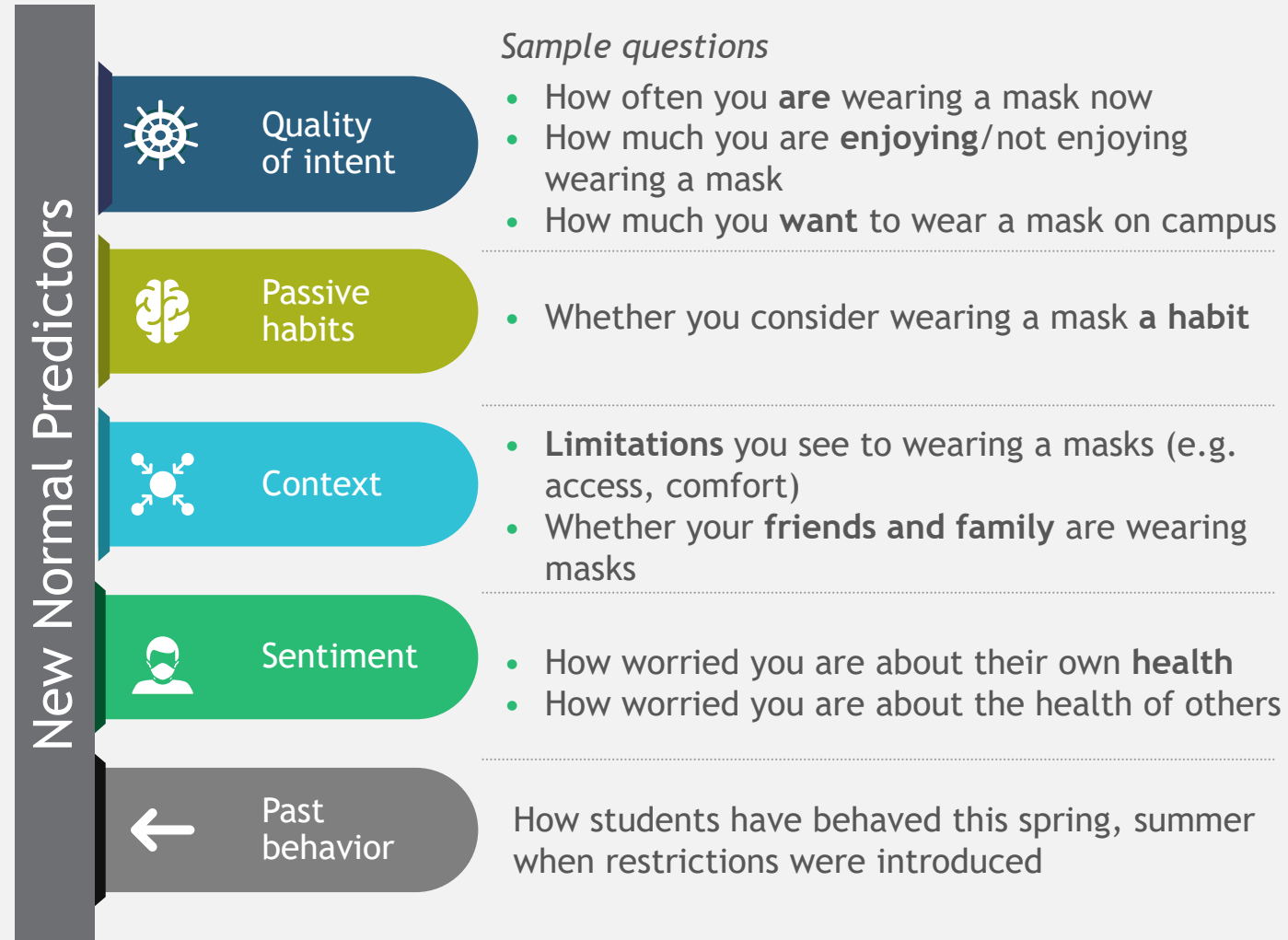
Option 1: "Head on"

Sample question: Do you plan to adhere to face-covering guidelines?

Risks:

- Responder feels pressure to say "yes"
- Responder is not prompted to consider how trade-offs (e.g. comfort) might impact their actual behavior

Option 2: Triangulate through NNPs

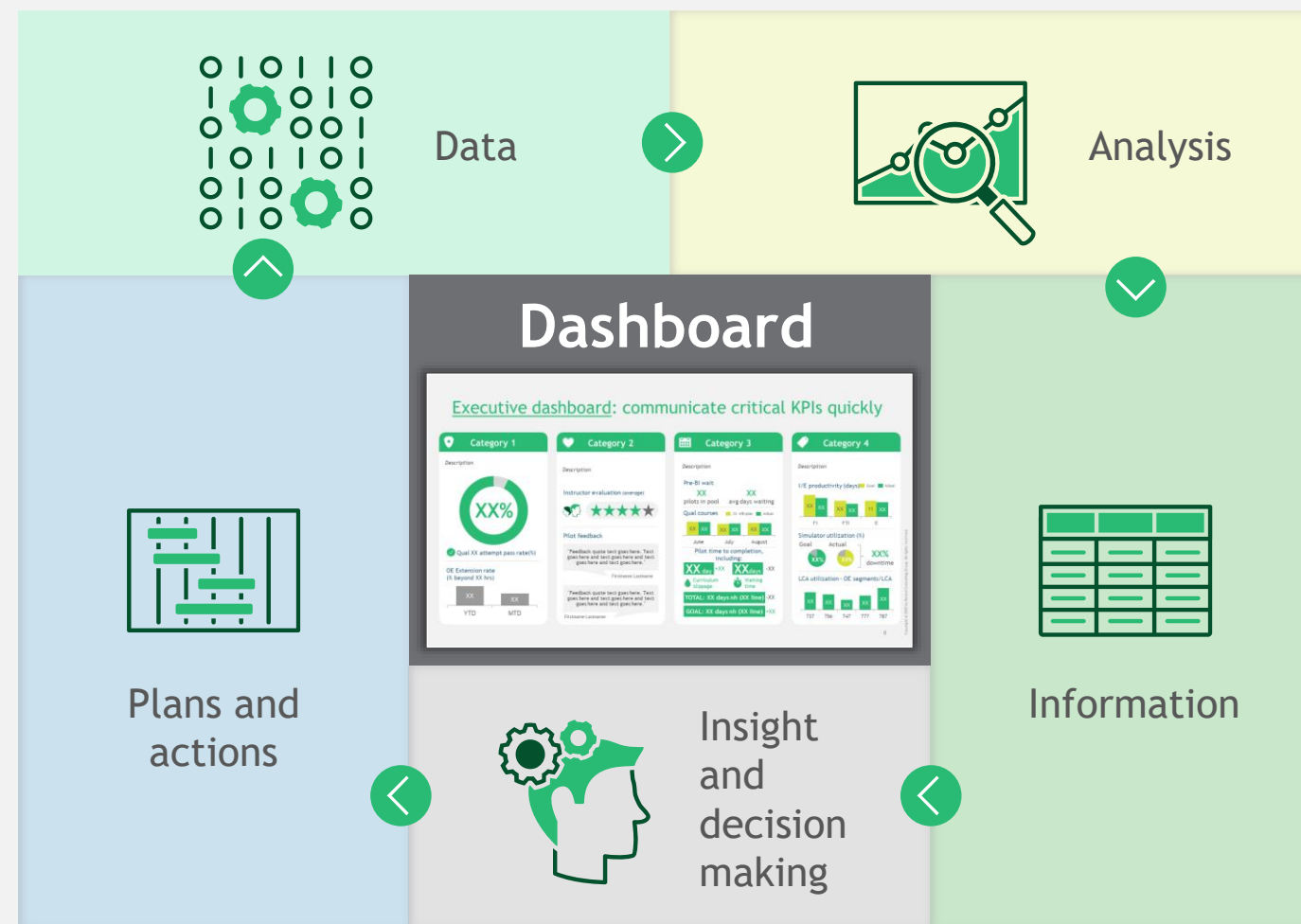


*Note:
Illustrative - not
all questions
are necessary*

*Survey can
cover many
activities (e.g.
"going to
parties",
"utilizing online
advising") in
single, efficient
NNP section*

Critical tool in rapidly evolving COVID context ...

Robust
dashboard
enables
“virtuous cycle”
of decision
making



... with value beyond COVID, as well

Dashboard | 3 value propositions



Creates an integrated, birds-eye-view of university

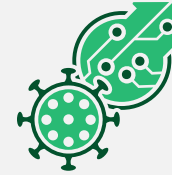
- Student academic experience
- Student experience beyond academics
- Community health
- Campus health
- 4T+IQ capacity and demand
- Etc.



Enables rapid decision making

For example:

- Will testing capacity continue to meet demand in the coming days?
- Should isolation capacity be increased?
- Should a floor be quarantined or a class canceled?
- Where are there gaps in the student experience...
- ...that could be filled by resources that are being under-utilized?



Builds a capability with relevance beyond COVID context

Opportunity to address, long-term, pain-point that COVID response has highlighted around "siloed" decision making

Dashboard | Top 10 priority metrics to include on dashboard

COVID containment

Longitudinal, daily

- **County status in state re-opening phases**
Source: State data
- **Positive test rate in County**
Source: State data
- **Positive test rates in counties in which students live**
Source: State data
- **Test results (outstanding, positive, negative)**
Source: Health partner
- **Number of people in quarantine & isolation (on campus & off)**
Source: Campus data
- **Assessments completed**
Source: Health assessment data
- **Symptomatic people identified**
Source: Health assessment data

Student Experience

Longitudinal, weekly

- **Adds/drops/changes**
Source: SIS
- **Attendance for online and in-person sections**
Source: LMS
- **Student "satisfaction" metric(s)**
Source: Student survey
- **Behavioral metrics**
Source: Student survey

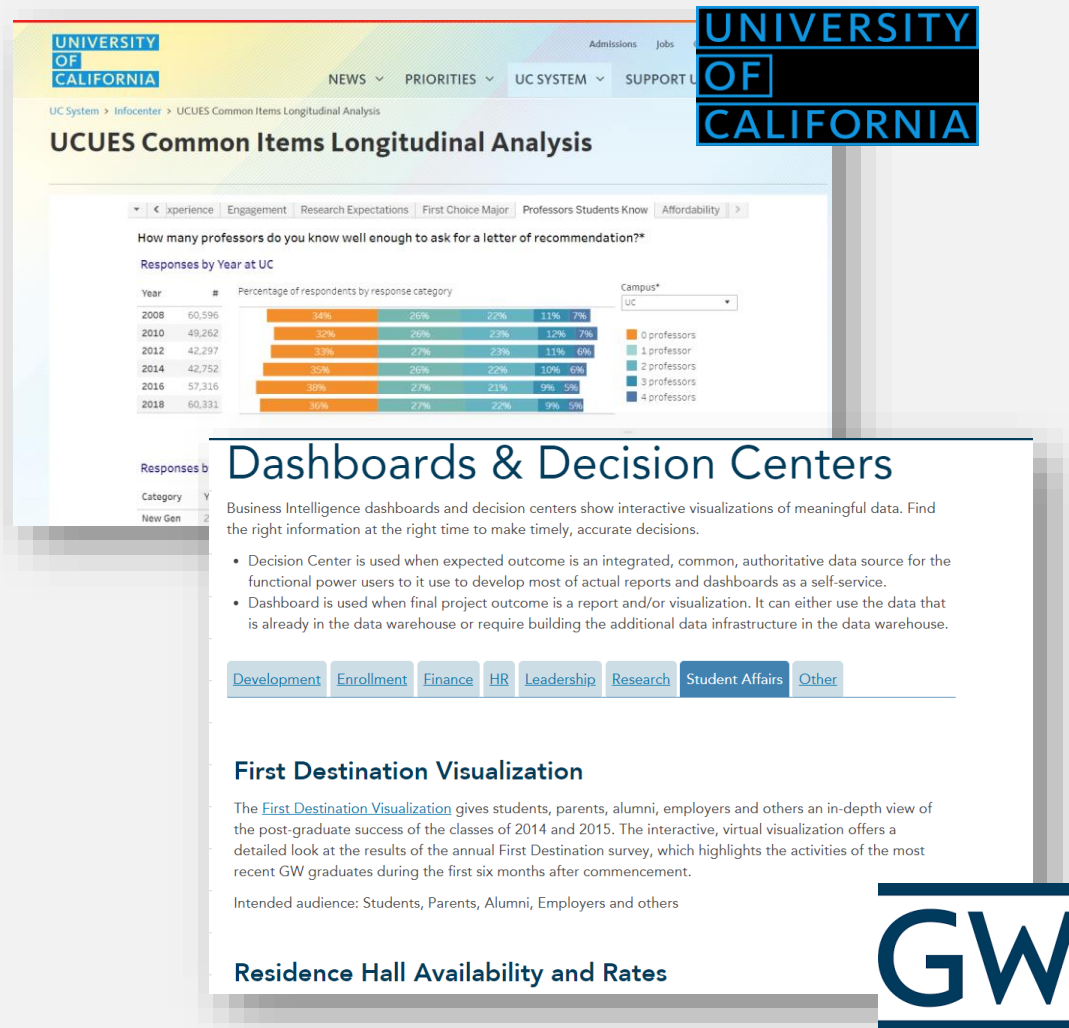
Employee Experience

Longitudinal, weekly

- *Source: Employee satisfaction survey*

*Need ability to "slice" data by select, key populations,
e.g. FTIACs, at-risk groups*






Dashboard | Example University dashboards (non-COVID)



- Universities are beginning to introduce "dashboards"...
- ...however, most keep information in siloes (e.g. a dedicated student affairs dashboard vs. a dedicated affordability dashboard)
- Can use the urgent need for a COVID dashboard to leap-frog others and create a centralized, integrated dashboard that provides a true "control center" for university decision making
- Recommend first developing dashboard for internal use, and considering expansion to external publication at a later time*

Appendix

Backup | Range of student experience offerings planned for Fall 2020 from Community Colleges and National Online colleges

		Overall Fall plan	Academics / Research	Extracurriculars	Campus facilities
NJY/NY Community Colleges	 NJY	<ul style="list-style-type: none"> Hybrid / mostly remote Similar approach for Stage 2/3 Flexible & subject to change 	<ul style="list-style-type: none"> Majority remote instruction (~90%) Mix of synchronous & asynchronous remote Majority remote advising & services 	<ul style="list-style-type: none"> Fully virtual clubs / events No athletics with exception of Golf 	<ul style="list-style-type: none"> Limited to required in-person instruction Limited library access Limited dining access No housing offered
	 NJY	<ul style="list-style-type: none"> Hybrid Restrictions relaxed in Stage 3 Flexible & subject to change 	<ul style="list-style-type: none"> Majority remote instruction in Stage 2, though shift to in-person in Stage 3 Majority remote advising & services 	<ul style="list-style-type: none"> Fully virtual clubs / events No athletics except for Golf, Cross Country, and Esports 	<ul style="list-style-type: none"> Limited library access in Stage 2, broader in Stage 3 Computer lab closed in Stage 2, limited access Stage 3 Dining limited / outdoor in Stage 2, indoor in Stage 3 No housing offered
	 NY	<ul style="list-style-type: none"> Hybrid Less flexible due to housing & in-person plans 	<ul style="list-style-type: none"> Mix of remote instruction (synchronous/asynchronous) & in-person rotating All in-person instruction concluded prior to Thanksgiving 	<ul style="list-style-type: none"> Athletics & intramural cancelled Clubs/ other activities held virtually or outdoors 	<ul style="list-style-type: none"> All residence halls converted to singles Dining limited to takeout service only Majority of on-campus facilities open for scaled-down use
National Online Colleges		<ul style="list-style-type: none"> Business as usual Established network of virtual offerings 	<ul style="list-style-type: none"> Fully remote; asynchronous classes Online advising/student support services available 	<ul style="list-style-type: none"> SNHUCONnect online student union Remote clubs, societies, and professional orgs 	<ul style="list-style-type: none"> N/A
		<ul style="list-style-type: none"> Business as usual Established network of virtual offerings Expand enrollment windows to accommodate increased interest 	<ul style="list-style-type: none"> Fully remote; asynchronous classes Online advising / student support services available 	<ul style="list-style-type: none"> Limited online offerings outside of academics & advising 	<ul style="list-style-type: none"> N/A



Student experience: Key components across potential fall 2020 postures

	Shutdown	Outbreak	Current, steady-state plan	Elevated steady-state
<i>Description</i>	<i>All students have been sent home; classes have all been moved online for the semester</i>	<i>Heightened restrictions vs. the steady-state plan, with the goal of moving back to steady-state, and avoiding sending everyone home. Assume significant population in quarantine.</i>	<i>Current plans for fall 2020</i>	<i>State moves into lower risk, college can loosen restrictions</i>
Classes	All online, rest of semester	All online, temporarily	1/3 online, 1/3 hybrid, 1/3 in-person.	Maintain fall schedule - no plans to switch online/hybrid to f2f.
Outside-of-class course guidance with faculty (e.g. office hours)	100% remote	100% remote expected, depends on depth of outbreak	Faculty encouraged to hold office hours, etc. remotely, but expect some face-to-face appts.	Predict that more faculty will hold more f2f office hours.
Formal advising (with faculty/staff advisor)	100% remote	100% remote expected, depends on depth of outbreak	Advisors encouraged to hold appts, etc. remotely, but expect some face-to-face appts. Offices are staffed - some staggered.	Predict more f2f appointments, but still a significant number of remote appointments, at least initially.
Co-curriculars (e.g. internships)	Depends on the community partner, but expect mostly remote.	Depends on the community partner and outbreak in community, but expect mostly remote.	Depends on the community partner, but mostly face-to-face.	Depends on the community partner, but increased face-to-face
Extra-curriculars	100% remote	Heightened restrictions may still allow some small extra-curricular events.	Mix of in person (small sizes) and virtual consistent with health guidance	Mix of in person (small sizes) and virtual consistent with health guidance; more events allowing larger gatherings likely
Mental health resources	100% remote	Office is staffed, but services are 100% remote. Possible face-to-face service in only crises cases	Office is staffed, but services are 100% remote. Office open for urgent walk in and crises needs	Increased face-to-face services reintroduced. Most online, at least initially, until distancing obligations (in small offices) are eliminated

Student experience: Key components across students

	Quarantine	Isolation
Description	<i>Student is restricted to his/her own dorm room or apartment; university providing some support if student lives on-campus</i>	<i>On-campus: Student has been moved to an isolation room; university is providing support</i>
Classes	Work with faculty to ensure academic continuity. Online: should not be a problem. Hybrid: Online pieces may be sufficient. Face-to-face: Will need alternate lesson plans.	Work with faculty to ensure academic continuity. Online: should not be a problem. Hybrid: Online pieces may be sufficient. Face-to-face: Will need alternate lesson plans.
Outside-of-class course guidance with faculty (e.g. office hours)	Online consultations with faculty.	Online consultations with faculty.
Formal advising (with faculty/staff advisor)	Online advising.	Online advising.
Co-curriculars (e.g. internships)	Case-by-case basis. May need to adjust expectations and graduation requirements. First priority is the student's health.	Case-by-case basis. May need to adjust expectations and graduation requirements. First priority is the student's health.
Extra-curriculars	Online participation only.	Online participation only.
Mental health resources	Online resources available.	Online resources available.
Structured social activities (e.g. eating in dining halls)	All meals consumed in quarantine room. Other activities online only.	All meals consumed in isolation room. Other activities online only.
Unstructured social activities (e.g. parties)	Must avoid.	Must avoid.



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