



October 2, 2023

Proposal for planning the delivery of free community college with Massachusetts Association of Community Colleges



The information contained in our response constitutes proprietary trade secrets or confidential commercial and financial information of BCG. Accordingly, pursuant to applicable laws and regulations, and based upon the exemptions from disclosure provided by the federal Freedom of Information Act and the exemptions provided under the Freedom of Information Law (FOIL), we hereby request that the Massachusetts Association of Community Colleges afford confidential treatment to the information in this proposal. If any person should request an opportunity to inspect, copy or otherwise obtain disclosure or use of any part of such information, we request that we be immediately notified of any such request, be furnished with a copy of all written materials pertaining to such request (including but not limited to the request itself and any agency determinations with respect to such request), and be given advance notice of any intended release or disclosure. Further, regardless of any requirements to the contrary, BCG reserves the right to request modifications to standard contract terms prior to execution of any agreement pursuant to this proposal.

October 2, 2023

Nate Mackinnon
Massachusetts Association of Community Colleges
Attention: Free Community College Planning RFP
mackinnonn@macc.mass.edu

Dear Mr. Mackinnon,

Boston Consulting Group (“BCG”) is pleased to submit this response to the Massachusetts Association of Community Colleges (“MACC”) Request for Proposal (RFP) on planning for free community college in Massachusetts.

As MACC prepares to deliver on the Healey-Driscoll Administration’s plans for free community college in 2024, this moment offers the opportunity to improve economic mobility in the Commonwealth while reducing racial and socioeconomic inequalities and cementing Massachusetts’ longstanding position as a national leader in education. We believe that BCG is the right partner for the following reasons:

We have done this before. BCG has deep expertise in strategic planning for the expansion of postsecondary enrollment and access. Over the past decade, we have worked with more than 100 institutions of higher education in the U.S. – as well as six states and regions – on improving college access, funding, and completion. Example projects include reducing financial barriers to access and redesigning operations at [Dallas College](#), one of the nation’s largest community colleges; setting outcome measures that matter in partnership with [Tennessee SCORE](#); benchmarking community college in Michigan with [Business Leaders for Michigan](#); and redesigning operations and developing a long-term strategy for affordable and accessible education with the [Connecticut State Colleges and Universities system](#). We publish extensively on higher education topics, from [student success](#), to [digital education](#), to [workforce pathways](#) and the [impacts of Generative AI](#) on higher education. Our experience gives us a deep understanding of the strategic issues ahead. More on our past work can be found in Sections 3 and 4.

We can move fast to meet your deadline. We understand a draft plan to deliver free community college is due to the Massachusetts legislature on December 15, 2023. BCG regularly partners with state and local agencies to quickly assess and plan for complex, highly public initiatives. We know we can deliver a rigorous product by this date, ready to be socialized with senior stakeholders. We also understand the scrutiny and stakeholder involvement that accompany such projects. In April 2020, we mobilized a 15-person team within days to create public-facing COVID reopening guidance across all state Secretariats. In the span of 3 weeks, we conducted multiple workshops with Cabinet-level leadership, conducted over 60 interviews, and delivered an accurate, consistent report that was published by the Boston Globe and stood up to scrutiny. In 2022, we moved rapidly to support the rollout of \$250M+ in ARPA funding provided to the Commonwealth, pulling together a team in October to provide recommendations in advance of a December funds expiry deadline. We can leverage our existing knowledge to quickly tackle work such as benchmarking state community college models, and our proprietary tools can inform complex work like modelling enrollment scenarios. We also have a stakeholder network in Massachusetts we can immediately begin to draw on across community colleges, the Executive Office of Education, Workforce Skills Cabinet, and workforce regions.

We bring a deep bench of relevant expertise. We bring a roster of highly experienced community college stakeholders ready to provide input on your challenge. Our network of BCG advisors includes senior community college veterans who have undergone the switch to state free tuition programs. This includes: Lina Bankert, who has worked with a statewide collaborative in Tennessee on strategy development, workforce pathways, and education funding; Allan Dobrin, former executive vice chancellor of the City University of New York (CUNY), who helped implement the New York Excelsior program providing free tuition to low-income residents in 2017; and Sara Enright, former Vice President of Student Affairs of the Community College of Rhode Island who helped lead Rhode Island Promise implementation in 2017. Leveraging the expertise of these individuals can ensure we are addressing the right questions quickly and mitigating challenges before they arise.

We know Massachusetts, and have extensive experience at the nexus of workforce, economic development, and education in the Commonwealth. Over the past 5 years we have completed hundreds of projects with Massachusetts organizations, including over 15 engagements with the state’s public agencies. Recent projects have included supporting the Executive Office of Economic Development to convene higher education stakeholders toward an economic development plan; working with the Massachusetts Technology Collaborative to design a quantum technologies “hub” based in Springfield; and supporting the Massachusetts Competitive Partnership and MACC to lay the foundation for the “Be Mass Competitive” program, with a focus on young adults of color. Importantly, BCG was founded in 1963 in Massachusetts and is headquartered in Boston, with over 1,700 staff based across two offices – we have a deep history with the Commonwealth and investment in its success.

We are extremely collaborative. We work alongside our clients and drive change in a sustainable manner that continues after we are gone. We would be excited to partner with you, leveraging the extensive knowledge and networks of your team to go faster together.

Our response, contained below, further details our approach and the experiences and insights we will bring to this effort. We look forward to the opportunity to further engage with you and discuss how we can support you.

Sincerely,



Rob Souza
Managing Director and Senior Partner, BCG



Tejus Kothari
Managing Director and Partner, BCG
Topic Leader, North America Higher Education



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Mapping of information requested in the RFP to sections in the response

INFORMATION REQUESTED IN RFP	RESPONSE IN THIS DOCUMENT
1. Proposed methodology, process, and timeline to deliver	Pg. 13: How we will approach MACC's needs
2. Experience and qualifications to do this work	Pg. 22: Our experience and qualifications Pg. 35: Our team
3. References who can speak to experience and qualifications	Pg. 39: References
4. Budget/cost for delivering these services	Pg. 40: Budget



1. Our understanding of the opportunity

1.1 MACC's unique context

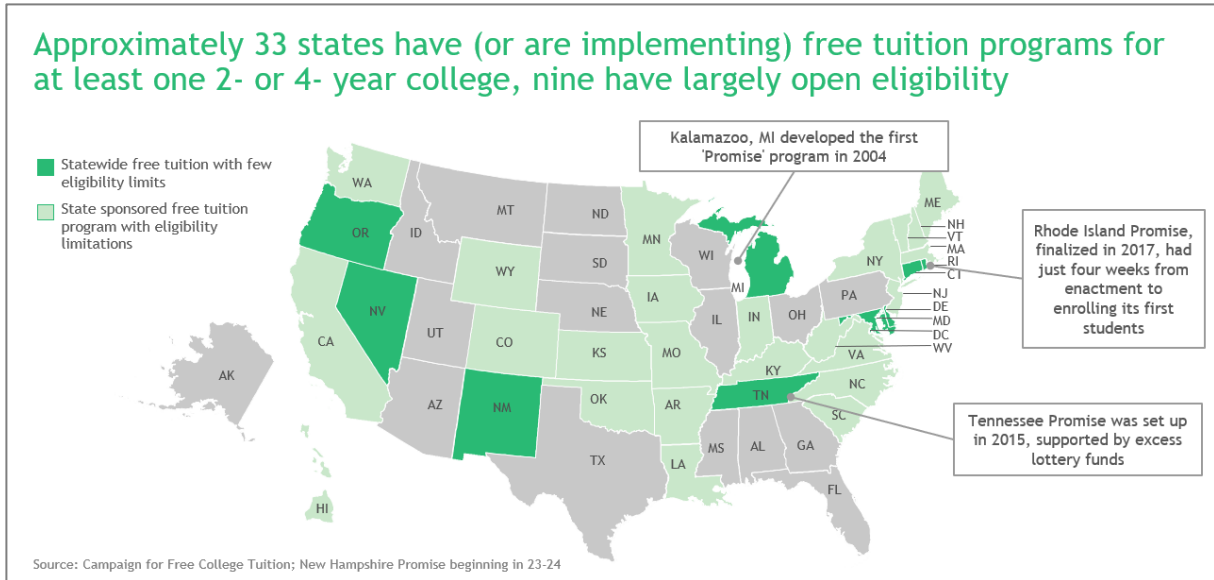
The Massachusetts Association of Community Colleges (MACC) represents and supports the Commonwealth's 15 community colleges, a critical pillar of Massachusetts' higher education system. These colleges collectively serve over 115,000 students per year, from the Berkshires, to the North Shore, the Boston metro area, to the Cape and Islands. They also play an essential role in education affordability, accessibility, and in promoting the Commonwealth's aims of economic prosperity and racial equity.

Expanded access to free community college has been on the Massachusetts legislative agenda for some time. Historically, Massachusetts has lagged other states in providing access to free community college (**Exhibit 1**), and in January this year Senate President Karen Spilka stated it was "beyond time" for universal free community college in the Commonwealth. This ambition came to fruition in August, when Governor Maura Healey announced that community college would become free for Massachusetts residents over 25 through the MassReconnect program and that nursing programs would become free for everyone, setting the aim of delivering universal free community college by 2024.

With MassReconnect already expected to reach 6,500 – 8,000 extra students in its first year¹, a more universal program will require community colleges to further anticipate and adapt to a new wave of enrollees in 2024. Funding for an expanded program has already been appropriated, with this year's budget setting aside \$12 million. We understand that MACC will be taking the lead on planning and rolling out free community college, with tight collaboration from the Executive Office of Education, the Commissioner of Higher Education, and input from community college presidents, the higher education advocacy community, and faculty.

¹ Healey-Driscoll administration estimates

Exhibit 1: States that have implemented free community college, by degree of eligibility



MACC is asking for three major areas of support when planning design and delivery, as outlined in the RFP:

- 1. Design the parameters of a free community college program.** A free community college program can take many forms, requiring choices around factors including eligibility, timing of dollars, extent of funding and other program benefits such as counselling or community engagement. Informed by the work of other states, MACC seeks a 'menu' of options to consider that outlines trade-offs between program elements and potential funding models.
- 2. Forecast impacts of free community college on colleges and the Commonwealth.** Any free community college program will have an impact on enrollments, costs, and outcomes. MACC seeks a partner to both define a shared understanding of the expected baseline state of community college in Massachusetts over the next 10 years and model the impact of potential new program options on this baseline.
- 3. Anticipate and plan logistics and implementation needs.** Accommodating a new program will require changes in resources and processes. MACC seeks assistance understanding the current capacity and capabilities of community colleges in Massachusetts, a description of what processes and resources may be challenged by increased enrollment, and a view of how to address these challenges. Beyond challenges, implementation provides an opportunity to increase enrollments and graduation rates – BCG will provide a view on actions that can support these factors, including communications, student support, and changes to program requirements.

Each of these areas will require engaging with and managing stakeholders, with MACC requiring a partner that has deep experience in this area.

1.2 Key points to consider in approaching this program

We believe that as you approach addressing this challenge, 5 key points should remain front of mind.

- Trade-offs around program design are a significant determinant of the magnitude of enrollments and completions – but not the only determinant.** The launch of MassReconnect immediately increased community college enrollment in Massachusetts. Making eligibility more universal will further increase enrollments, but design choices around eligibility will impact the scale of this increase and must be modelled when choosing a model for Massachusetts.

There are trade-offs to be made both between access and completion, and access and cost. GPA requirements, for example, increase completion rates but reduce the number of students who may qualify. Minimum credit requirements can increase completions but increase challenges for those with work or caregiving responsibilities. Minimizing restrictions can reduce complexity, benefiting accessibility and enrollment, but can increase program costs without necessarily leading to more completions.

Massachusetts can learn from the evidence generated by other programs to understand how design choices around eligibility may impact enrollment (**Exhibit 3, after the break**). It is worth noting design choices are not the only factors impacting enrollments and completions. BCG experience has found many states have not experienced the magnitude of enrollment and completion jumps they expected from free community college. We know factors broader than eligibility are important, including effective program communication, flexible learning models, assessment of prior learning, childcare and transport accessibility, and counselling and social support (**Exhibit 2**). We will bring this lens to our work, helping Massachusetts predict and optimize program uptake and success, noting and integrating the existing work of local programs such as [SUCCESS](#).

Exhibit 2: Barriers to enrollment and completion and potential methods to address these

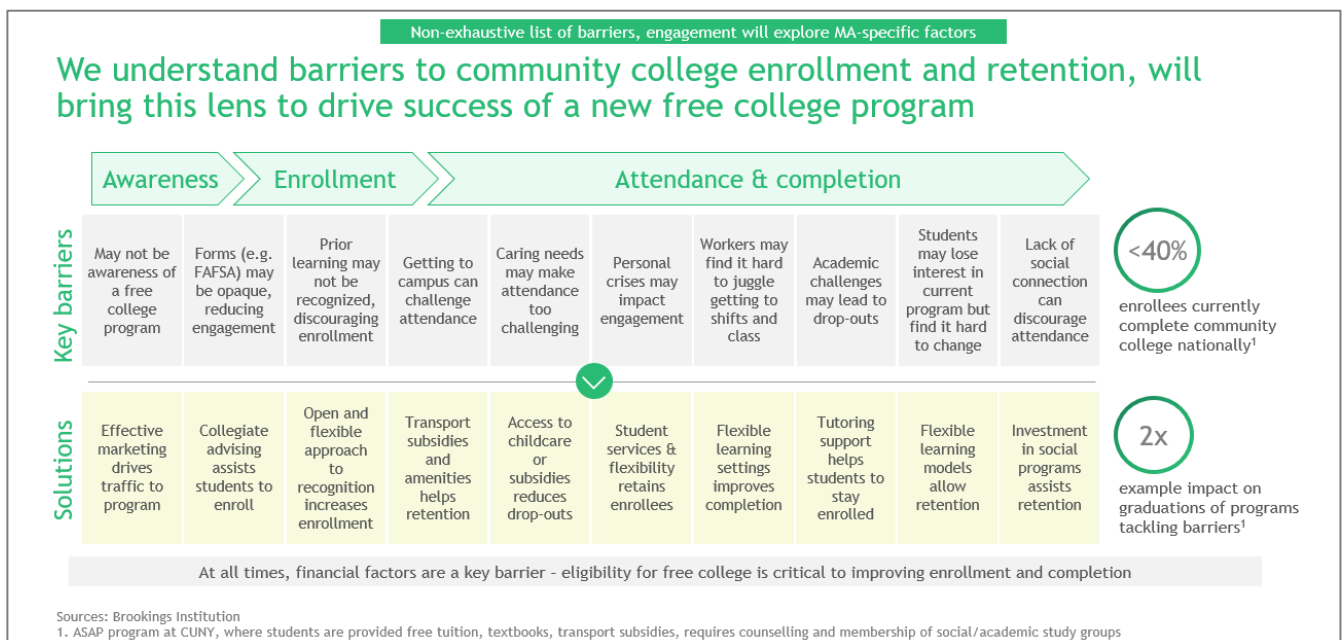


Exhibit 3: Evidence from other free community college programs, alongside academic estimates of impacts

Increasing affordability increases community college enrollments, but design choices are key to the scale of this impact

	Program design	Impact	Learnings	Non-exhaustive
Analysis of 33 Promise programs¹	All programs offer at least free tuition	23% Increase in community college enrollments	<ul style="list-style-type: none"> Largest increases among Hispanic and Black women Programs with income criteria have negative enrollment impacts on all groups except Black men First-dollar programs had highest uptick in White enrollees 	
Biden White House estimates of free tuition²	Free tuition and academic fees, first-dollar	18% Increase in community college enrollments 43% Increase in community college graduations 8% Increase in MA 2- & 4-year enrollment	<ul style="list-style-type: none"> Predicted reduction in private 4-year college enrollment (but not public) Most benefits are from students who otherwise would not have attended college at all 	
FTC estimates of free tuition³	Free tuition, first-dollar	26% Increase in community college enrollments 20% Increase in community college graduations	<ul style="list-style-type: none"> Most valuable for middle-income students 	
	Free tuition, last-dollar	10% Increase in community college enrollments & graduations	<ul style="list-style-type: none"> Estimated to provide no benefit to low-income students Limits switching between 2- and 4- year colleges 	
	Free tuition, last-dollar, income based	13% Increase in community college enrollments 4% Increase in community college graduations	<ul style="list-style-type: none"> Estimated to be beneficial to low-income students, but decrease enrollment for middle- and high-income students 	
Analysis of Oregon Promise⁴	Free tuition, 2.0 GPA requirement	5% Increase in community college enrollment	<ul style="list-style-type: none"> A significant portion of enrollment came from students switching from 4- year colleges 	
Analysis of Knox Achieves⁵	Free tuition, last-dollar	5% Increase in community college enrollment	<ul style="list-style-type: none"> Decreased 4- year college enrollment by ~1pp Gains larger among low-income students who likely saw little benefit 	
Analysis of Tennessee Promise⁶	Free tuition, last-dollar	6% Increase in community college enrollment (first-year)	<ul style="list-style-type: none"> ~1-2pp reduction in Black student enrollment at Promise <i>ineligible</i> colleges⁷ Enrollment has since plateaued 	
Analysis of Pittsburgh Promise⁸	Free tuition, City residents, school attendance	5% Impact in 2- & 4- year enrollment	<ul style="list-style-type: none"> Enrollment impact higher in 4- year than 2- year colleges 	

1. American Educational Research Association, 2020, examined 2000-2001 and 2014-2015; 2. Federal government free tuition review, Sonecon, 2021; 3. FTC Working Paper 347, 2020; 4. Gurantz, 2019; 5. Carruthers, 2016; 6. Tennessee state Comptroller; 7. Bell, 2021; 8. Page, 2019

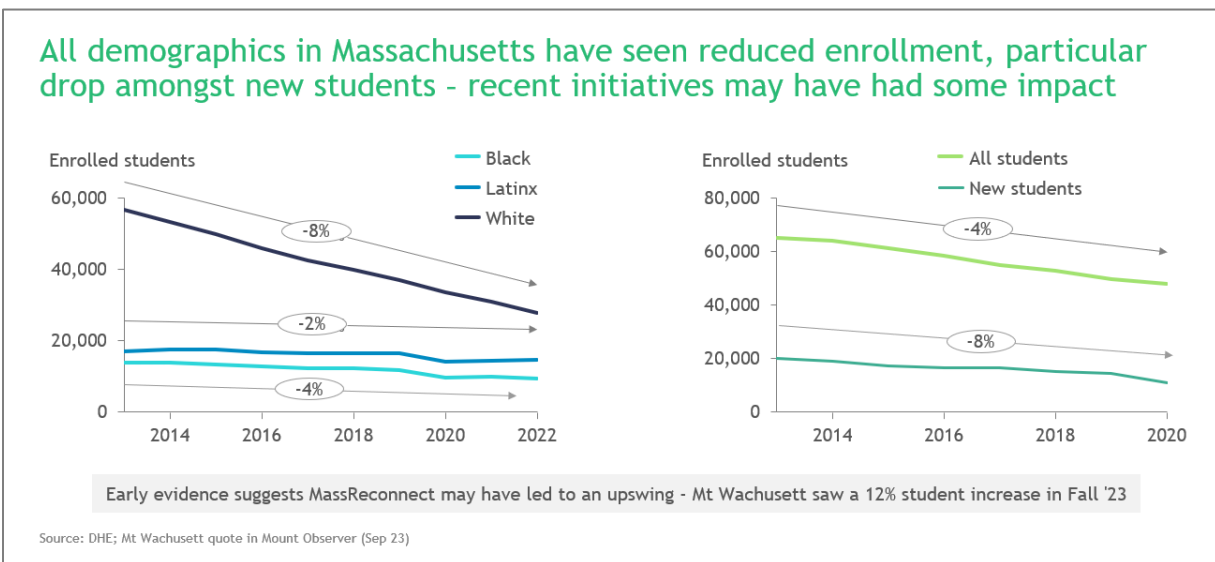
2. **Beyond eligibility, budgetary constraints will force trade-offs in other areas including program timing and coverage that must be modelled.** The cost of a free community college program is not only determined by how many students are eligible, but also how much is covered and when the program kicks in relative to other funding. Choices in these areas must be made in line with prioritization of goals:
 - a. *Timing tradeoffs – equity vs cost:* Coverage timing impacts students differently. A first-dollar program (provided before any other funding) benefits low-income students who can then spend any other funding they receive on other costs, but a last-dollar program (applied after other funds until e.g. tuition is met) may give no support to these same students if their tuition has already been covered. A last-dollar program is therefore less expensive but does less alone to support equity (and vice-versa).

b. *Coverage tradeoffs – college affordability vs cost, enrollment and completion:* Coverage choices include covering tuition, fees, supplies, or even living costs. These choices are important not only due to program costs, but also because student decisions to enroll and remain in college may depend on the level of support provided. High schoolers who believe they can't afford higher education are ~20% less likely to attend college within the first three years after high school.² 29% of community college students face food insecurity and 14% are housing insecure. Almost 70% of community college students report a lack of finances could cause them to withdraw from college.³

3. **Recent enrollment downturns mean new enrollments will be welcome, but a baseline assessment of capacity, capabilities and resourcing is important to ensure adequate student support.** Most community colleges in Massachusetts saw headcount drops of >30% over the 10 years to 2022, concentrated amongst new students (**Exhibit 4**). The Commonwealth is producing ~2,000 fewer associate degrees today than it did in 2017.⁴ Early Fall 2023 evidence suggests enrollments may have increased (in part thanks to MassReconnect), but not to historic levels.⁵ High-level estimates using evidence from other programs interstate suggests that after several years of a free community college program, colleges could see a 5-25% increase in enrollments overall. This would not create unprecedented student numbers – this level of FTE was managed by Massachusetts community colleges as recently as 2020-21 (**Exhibit 5**).

However, a sudden wave of enrollments may challenge resources, capacity and processes. New students targeted by this program may have unique needs such as increased counselling or academic support. An assessment of capacity and capabilities as part of planning is essential to ensure there are adequate staff and resources for new students. Lessons from other states can anticipate needs and inform preparation.

Exhibit 4: Expanding eligibility will hopefully continue reversal of a concerning trend



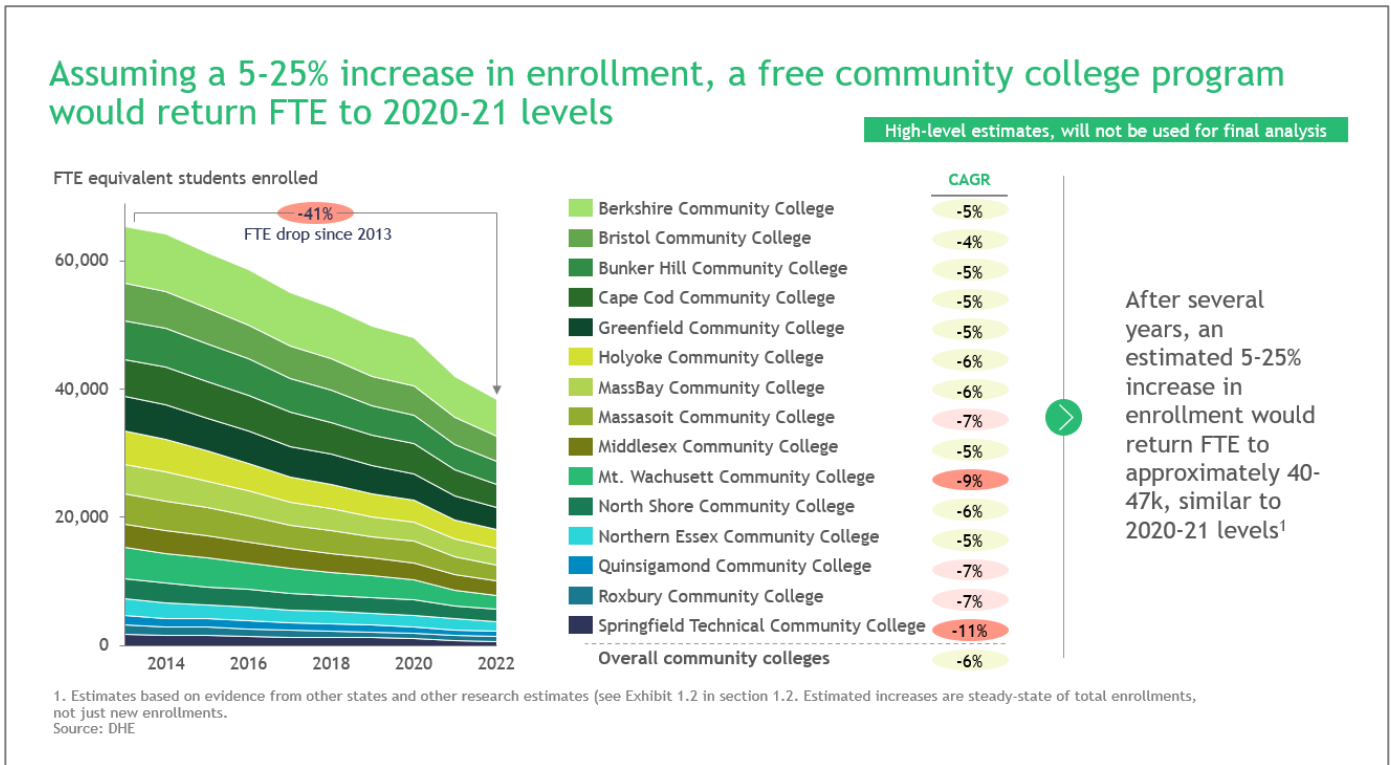
2. US Department of Education National Center for Education Statistics

3. Center for Community College Student Engagement

4. BCG analysis for MA Economic Development Planning Council

5. The Gartner News, reporting on Mount Wachusett Community College

Exhibit 5: Increased enrollment may bring community colleges to familiar student numbers, but these students will have unique needs, and colleges will have changed since 2020-21



4. Pre-empting stakeholder concerns will be key to program success. Some groups may require close engagement to ensure their cooperation and participation in the delivery of free community college. Examples include:

- *Political and advocacy concerns:* Free community college means different things to different stakeholders. Conflicts are important to pre-empt. Successful examples of anticipating and mitigating challenges in Rhode Island include fundraising for supplemental cost-of-living grants to address equity concerns around a last-dollar funding model and introducing credit requirements to address concerns of those that would not accept a ‘no strings attached’ program. While circumstances in Massachusetts will be unique, any approach must resolve several issues like these.
- *Public 4-year colleges, particularly those that serve low-income individuals:* Several 4-year colleges are likely to see their enrollments cannibalized under a free community college program. Mitigation strategies can include improving 2- to 4- year transfer policies and processes as well as increasing dual enrollment of high school students in colleges to reduce their 4-year degree costs. However, no matter the level of pre-emption some resistance should be anticipated.
- *Faculty unions:* Faculty are likely to be excited about the program overall but may have apprehension around student-faculty ratios. Massachusetts is already challenged for teaching talent by competing

organizations both locally and nationally.⁶ A new program should ensure faculty are on board with predicted changes in student numbers and propose whether changes in compensation or staff number are required to both comply with classroom minimums and attract and retain necessary talent.

5. **There is much to be gained from a successful program, including expansion of high-need talent pipelines and direct economic benefit.** With the number of jobs in Massachusetts requiring associate degrees growing, free community college can help meet employer and Commonwealth needs. While Governor Healey has already announced free community college for nursing students, a demand area for employers, other areas such as protective services and education have seen need for community college graduates grow but 2-year degree production shrink.⁷ Keeping a program focus on building the community college-to-employer pipeline can drive economic development for the Commonwealth and contribute to student success and prosperity through improved employment outcomes.

There is huge opportunity in doing so: federal government estimates predict that first-dollar coverage of tuition and fees would provide a GDP gain of \$165M in Massachusetts alone.⁸ And for individuals, employees who have earned an associate degree are paid 16% more than those with just a high school diploma. Keeping economic improvement for the Commonwealth, its businesses and its residents front of mind is key to motivating the design and delivery of a successful program.

6. Responses to RFP questions, MACC, September 25

7. Lightcast labor market data

8. Estimates from federal government free tuition review, Sonecon, 2021. These estimates were conducted prior to the introduction of MassReconnect, so include the benefits of that program.

2. How we will approach MACC’s needs

Our detailed approach to accomplishing the goals of the RFP is detailed below. We propose engaging with MACC over two phases:

- **Phase I** in the lead-up to the draft report in December, outlined in detail below, where BCG will focus the bulk of its analytic capabilities,
- **Phase II** from December until April which will focus on revision, enablement, and engaging key stakeholders.

We believe this arrangement will deliver a clear plan underpinned by rigorous analysis and extensive stakeholder engagement, and ensure the project is on track to deliver the right answer in a timely fashion.

2.1 Overview of approach

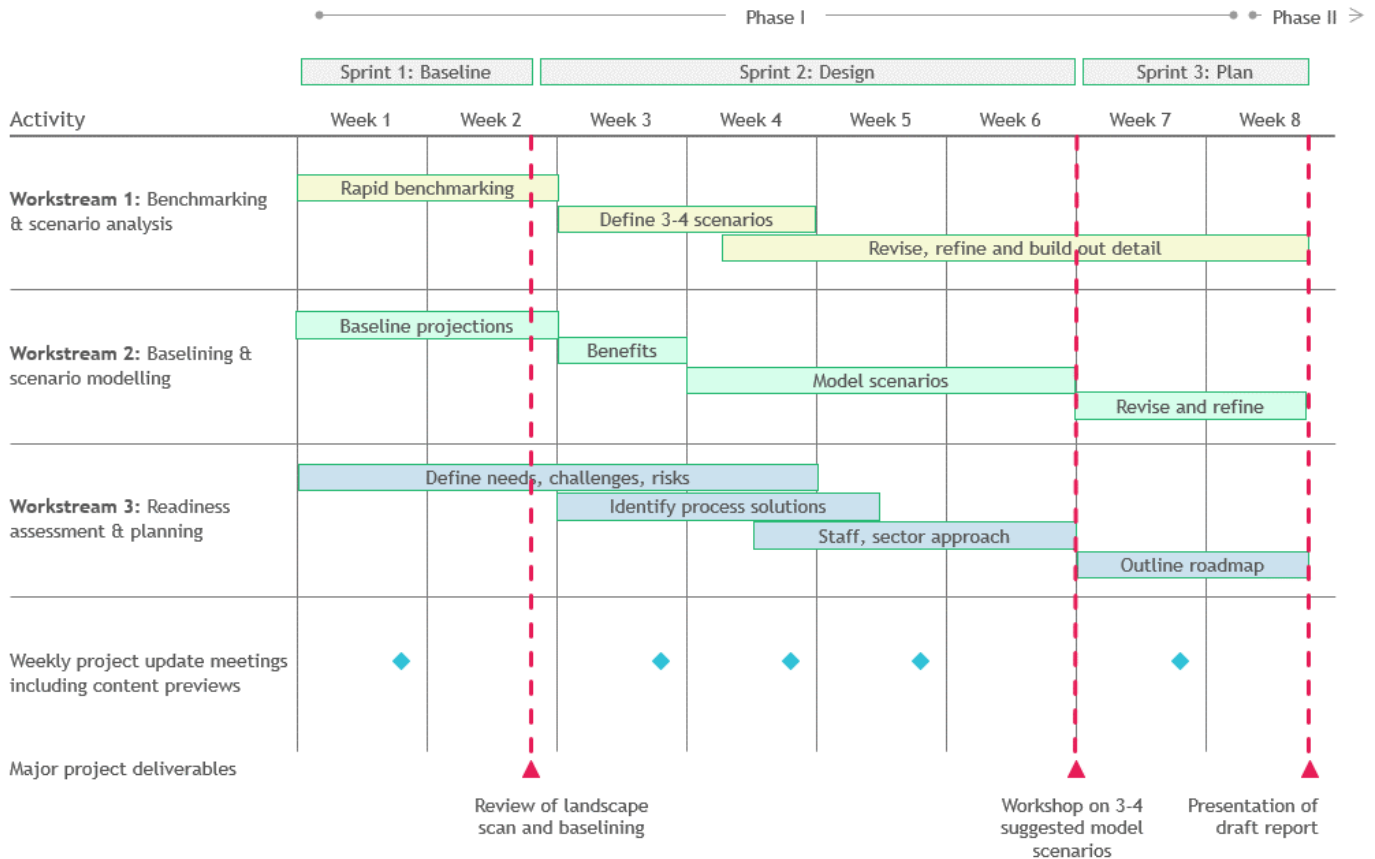
To accomplish the objectives set out by MACC during **Phase I** we will establish three workstreams, managed by BCG team members working closely with relevant Massachusetts community college stakeholders:

- **Workstream 1.** External benchmarking and scenario analysis
- **Workstream 2.** Baseline and scenario modelling
- **Workstream 3.** Readiness assessment and implementation planning, including risks and challenges

Phase I will focus on sprinting to a draft report that will set up MACC for success. We believe we can deliver on MACC’s aims in a period of 8 weeks divided into three sprints:

Sprint	Weeks	Aim	Deliverable
Sprint 1: Baseline	1-2	Define our aspiration and principles in partnership with key stakeholders, learn from other states, develop the ‘baseline’ for Massachusetts used to later model changes	<ul style="list-style-type: none"> • External landscape scan including benchmarking & case studies • 10-year baseline forecast model
Sprint 2: Design	3-6	Develop workable, attractive ‘menu’ of 3-4 scenario models, supported by a well-defined fact base of financial and systemwide implications including risks, benefits and specific considerations (e.g. staff compensation changes)	<ul style="list-style-type: none"> • 3-4 suggested scenarios for free community college, including estimates of impact on baseline
Sprint 3: Plan	7-8	Develop a tangible view of the pathway to deliver on free community college with a focus on developing enablers, key first steps and critical decisions to be made along the delivery pathway	<ul style="list-style-type: none"> • Draft report with proposed direction forward • High-level roadmap • Editable financial and resource forecast model to support any changes made in Phase II

Below outlines the proposed focus of each workstream across Phase I. The sections below go into detail about the activities of each workstream, alongside relevant details.



We will work with MACC to define the right engagement model with key project stakeholders. This will involve working side-by-side with certain groups, including:

- ▲ **The Steering Committee**, made up of senior leaders in MACC, the Commonwealth and potentially select community college presidents (to be determined by MACC and the BCG team). This group will attend major readouts and provide feedback, assist in addressing major barriers, and be the final say on important decisions regarding progress, including what directions to continue and which to de-prioritize.
- ◆ **The Working Group**, made up of individuals close to the delivery of free community college who will be more intimately involved in the day-to-day work of the project. This group will attend weekly project update meetings to preview and test initial findings, push and shape direction, help the team navigate stakeholders and agencies, and assist in coordinating meetings, interviews and data.
- **Other stakeholders, internal and external (e.g. advocacy groups, faculty unions), who will:**
 - Provide important context and insights that could not be found elsewhere
 - Give feedback on ideas reflective of their own experience and knowledge

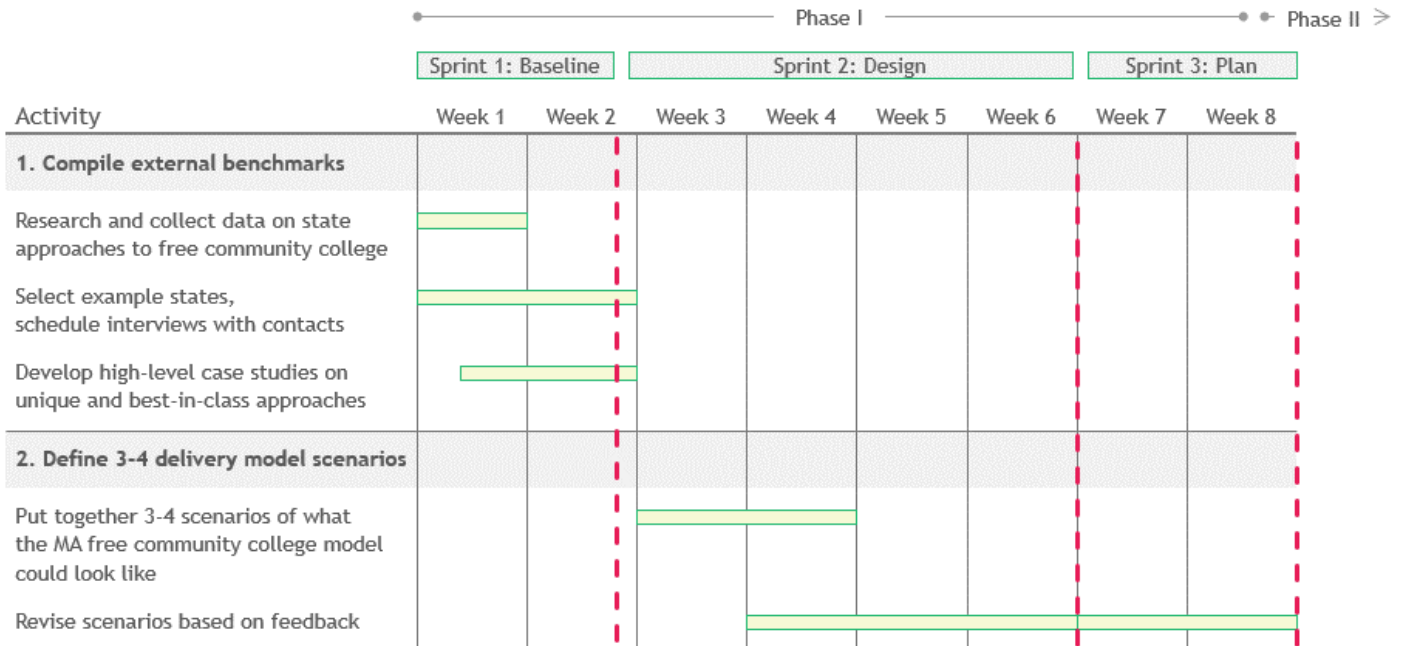
Phase II (January-April) will focus on refining the draft report. Using the scenario model developed in Phase I, enrollment and cost forecasts can be adapted to reflect any final design decisions made by the Steering Committee in Phase II. The BCG team will be streamlined in Phase II to support light touch Steering Committee engagement and revisions. If additional interviews and focus groups are required beyond the Steering Committee, or if additional strategic analysis is needed such as more granular model segmentation, we are happy to engage in scope discussions with MACC and to amend our proposal and resourcing.

2.2 Detailed workplan

Phase I

Workstream 1: External benchmarking and scenario analysis

This workstream will focus on developing and modelling a ‘menu’ of 3-4 scenarios for delivering free community college. These will be based on a shared view of Commonwealth priorities, lessons learnt from other states, and the experience of our team who have done this before. The deliverables will provide the rationale behind the scenarios and analysis into tradeoffs that went into design choices, giving the Steering Committee confidence in their preferred options. A summary of activities spread across the timeline is below, with key activities outlined in more detail in the following table:



#	Activity	Primary questions and sub-activities
1	Compile external benchmarks of community college programs nationally, including interviews of select state contacts	<ul style="list-style-type: none"> Using our perspective on the key high-level design choices when it comes to free community college and existing knowledge of other programs, conduct a ‘rapid scan’ benchmarking state approaches to free community college For a 2-3 key states, conduct interviews to deepen understanding regarding design decisions, funding models, enrollment impact, personnel approach, factors contributing to student and program success (example states outlined in Exhibit 6, to be revisited after rapid scan) Develop high-level case studies, identifying what elements might be useful to planning in Massachusetts and key lessons
2	Define 3-4 scenarios (‘menu’) for what free community college could look like in the Commonwealth	<ul style="list-style-type: none"> Outline 3-4 scenarios of what free community college could look like, defining key design decisions including eligibility, timing, extent of coverage and funding model (e.g. direct appropriation, reimbursement models, formula distribution, financial aid distribution, etc) (see Exhibit 7) Outline key tradeoffs made in each scenario, such as decisions made to balance cost vs eligibility, access vs completion Revise these options based on Steering Committee feedback, collaborating with Workstream #2 to understand from community colleges what implications each scenario could have on their personnel, operations, and finances

Exhibit 6: States differ in eligibility, extent of funding and timing of their free community college programs. We intend to examine several state case studies, describing how their programs vary across these dimensions

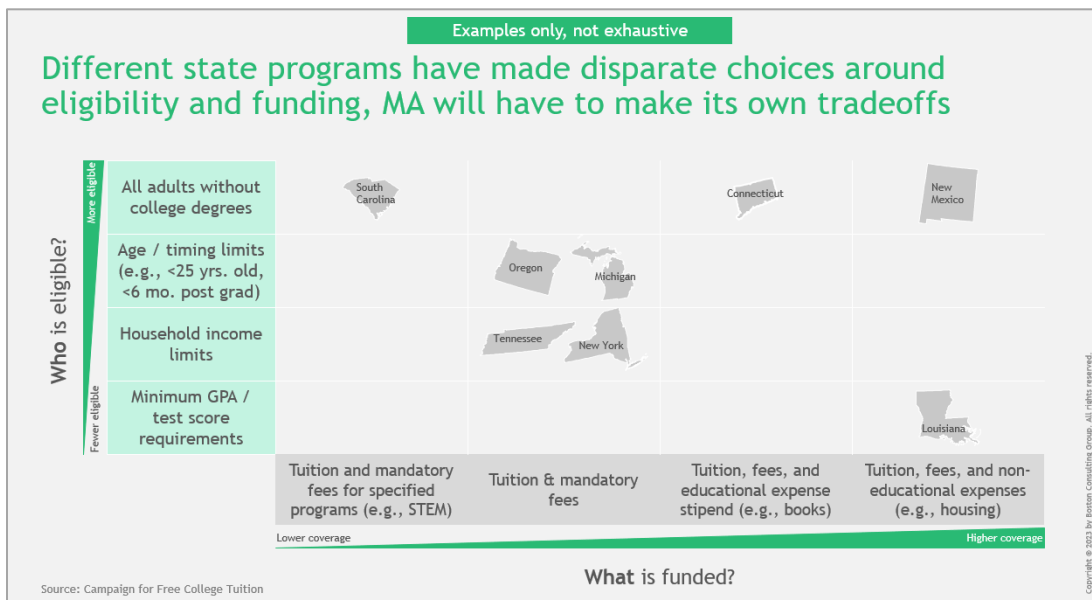


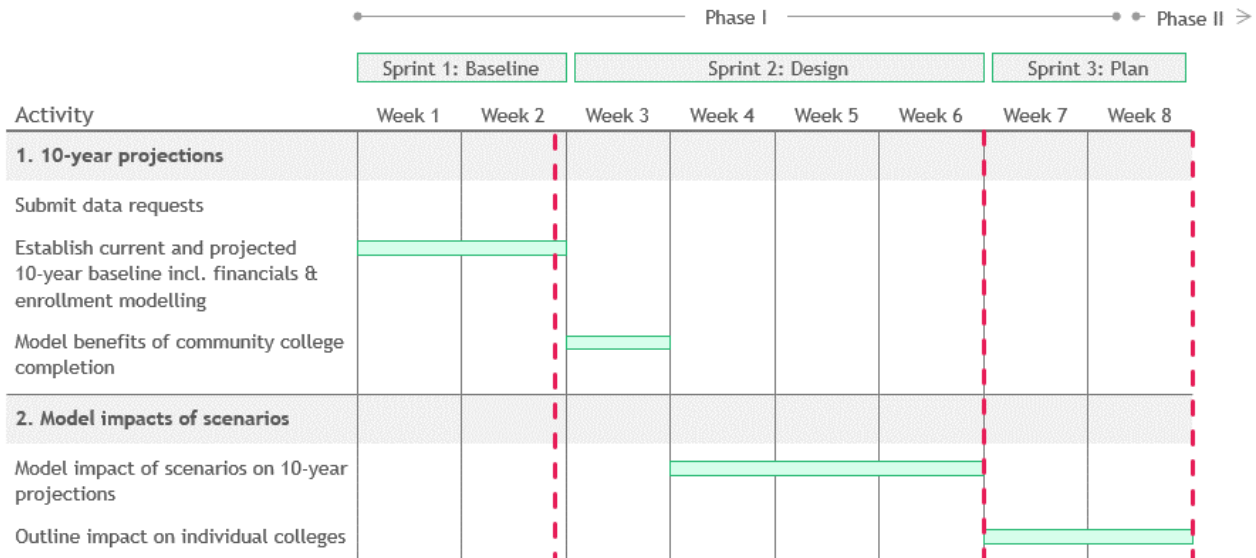
Exhibit 7: We intend to create a range of free community college scenarios to discuss with the Working Group and Steering Committee, developing consensus around elements of a final model

Combinations of design choices will be used to create scenarios, informed by the work of other states and Commonwealth priorities

	Illustrative only			
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Eligibility				
Residency	MA residency			
Background	No prior college			
Financial requirements	No requirements			
Academic requirements	2.0 GPA Full-time enrollment			
Other (e.g., volunteering, work)	Employment or volunteer hours			
Timing				
First, middle or last-dollar	Last-dollar	Scenarios to be developed throughout Sprint 2		
Funding				
Tuition	Topped up until free			
Other (e.g., fees, living expenses)	Fees only			
Estimated # new students	12,000			
Estimated # addtl. completions	3,600 (30%)			
Additional funding required	\$17M annually			

Workstream 2: Baseline and scenario modelling

This workstream has a focus on building out financial estimates that will underpin our baseline 10-year view of the current community college system and support modelling of the proposed ‘menu’ of scenarios. A summary of activities is below, with key activities outlined in more detail in the following table:



#	Activity	Primary questions and sub-activities
1	Develop 10-year Massachusetts baseline projections across educational and financial dimensions	<ul style="list-style-type: none"> Using available data, establish current and projected baseline community college enrollments, student costs, college, state and federal costs, and completion rates (description of potential model components and example of data required outlined in Exhibit 8) Model high-level impacts of community college completion, showing current financial and economic benefits to the state and residents
2	Model impacts of scenario options ('menu') on baseline projections across key dimensions	<ul style="list-style-type: none"> Model each suggested scenario, showing impact on enrollment, completion, state benefits and costs, providing high level estimates of impacts on specific demographics Outline how enrollments will impact individual community colleges and their prospective resource needs, including personnel, technology and physical resources, with inputs informing implementation planning in Workstream #3

Exhibit 8: Example of data required for baseline modelling and rationale

Area to model	Potential source	Notes/considerations	Non-exhaustive
<i>Student costs</i>			
# of enrolled students & credits	DHE, IPEDS, college IR	<ul style="list-style-type: none"> Demographic breakdown required to model impact of differing eligibility requirements Students and credits required due to part-time and full time split On-campus and online credit breakdown required for resource planning 	
Tuition cost	DHE, MACC, college P&L and IR, City, external research	<ul style="list-style-type: none"> Split of costs paid by students themselves and costs covered by other sources required to model impact of differing timing choices (first, middle and last dollar) 	
Fees cost			
Supplies cost			
Living cost			
<i>Community college operating costs</i>			
Teaching costs	Commonwealth, college P&Ls	<ul style="list-style-type: none"> Analysis must break down costs to state and colleges to model impact of different funding models Fixed/variable split required to model impact of enrollment increases 	
Administrative costs			
Other variable costs			
Fixed costs			
<i>Benefits</i>			
# of qualifications produced	DHE, IPEDS	<ul style="list-style-type: none"> Split by degree type (associates, certificate) required to model differing impact of each 	
Economic impact	Research, interviews	<ul style="list-style-type: none"> Includes state and individual benefit (e.g. pay uplift) 	
<i>Resources</i>			

# community college FTE	Community colleges	<ul style="list-style-type: none"> Breakdown by staff function (teaching, administration etc) required to plan resource needs Salaries required to model staff and compensation changes
# other per-student and credit resources	Community colleges	<ul style="list-style-type: none"> Requires breakdown by resource where available such as equipment, technology, space etc to assist planning

Workstream 3: Implementation planning, including challenges, risks and logistics

This workstream has a practical focus, defining current needs and necessary considerations in delivering a new operating model including risks, policy considerations, and logistical requirements. This workstream will leverage the lessons learnt by BCG and our expert bench in delivering free community college in the past. We recognize that strong analysis is not enough, with our real-world experience differentiating our approach. We will use our knowledge to start several steps ahead and deliver a solution that is ready to kick off early actions in 2024. A summary of activities is below, with key activities outlined in more detail in the following table:



#	Activity	Primary questions and sub-activities
1	Define implementation needs and challenges for free community college rollout through 1:1 interviews and focus groups	<ul style="list-style-type: none"> Meet with key staff at community colleges to assess capacity to scale up enrollment, including current resources Understand existing processes (e.g. application, enrollment, registration) and their current capabilities and degree of fragmentation, identifying how they may need to be scaled, adapted or centralized Outline potential challenges to implementation, including faculty and staff needs, administrative hurdles, physical resource needs and other capacity issues
2	Describe potential process solutions to address implementation needs	<ul style="list-style-type: none"> Leverage work in Workstream #1 to outline potential process solutions used by other states to support upticks in students (e.g. digital options, physical resource load balancing) Describe recommended changes to processes that may be required to support implementation
3	Outline suggested approach to staff compensation as well as key employment risks	<ul style="list-style-type: none"> Identify potential material impacts on staff workloads Analyze Massachusetts compensation data and benchmark other states (using case study interviews from Workstream #1) as relevant Conduct interviews with relevant stakeholders to identify potential teacher and union considerations Describe suggested model to support staff employment and retention during rollout, including estimated compensation adjustment required, risks and mitigation strategies
4	Outline how to mitigate impacts on other areas of the sector	<ul style="list-style-type: none"> Describe how free community college might be expected to impact on other educational institutions Outline potential mitigation methods, e.g. explore 2- to 4- year transition options to support the program
5	Develop high-level implementation roadmap with particular focus on enablers and first steps, including outline of comms strategy	<ul style="list-style-type: none"> Outline enablers required to deliver free community college, critical decisions and their timing, and key first steps Leverage conversations with stakeholders, BCG experts, and research on states who have implemented community college before to recommend a high-level communication strategy, including principles that should guide communications

Phase II

Phase II will follow the delivery of the draft report in Phase I and extend until **delivery of the final report in April**. The design of these phases prioritizes allowing community colleges to start preparation as early as possible in anticipation of the program beginning later in 2024.

While BCG will continue to be accountable for the overall work and involved in key engagements, the BCG team will be streamlined in Phase II. During this phase, feedback on the draft report from a variety of sources will be integrated and findings socialized.

This phase will involve:

- Executing refinements to the financial and enrollment model based on changes to design choices, leveraging the model developed in Phase I,
- Adding light-touch detail to any required areas,
- Putting together the final report for delivery.

To ensure as robust as possible an “answer” before the December draft, analysis has been front-loaded into Phase I. We have not scoped further focus groups, detailed modelling or benchmarking (beyond the editable model delivered in Phase I that will support modelling changes to design choices in Phase II) into this phase, but we would be happy to discuss further needs with MACC.

BCG may engage partners from its network to support stakeholder engagement and refinement work, to be diligenced by BCG based on our understanding of project needs as the draft deadline approaches.



3. Our experience and qualifications

3.1 Who we are

BCG is a global management consulting firm with 60 years of experience and more than 20,000 staff. We are a global leader in strategic planning for both the public and private sectors and have extensive experience evaluating strategic priorities, designing operating models, and establishing implementation plans. We have significant experience working with public sector organizations in Massachusetts as well as the higher education sector nationally. We have worked with over 100 higher education institutions in the last decade in the US alone to address their most critical challenges and opportunities.

We have the experience, knowledge, proprietary data, and resources to best support you in this effort and have had significant project experience relevant to our work with you as outlined below.

3.2 Our relevant project experience

MACC has requested a consulting partner with experience and qualifications to do this work. The case studies below demonstrate BCG’s experience, including examples which show our work supporting community colleges, working with the Massachusetts government, and expanding financial access to higher education including 2-year degrees. A summary table of our work is located below, with detailed case studies beneath.

CASE STUDIES	MA-BASED	TUITION/ ENROLLMENT IN HIGHER EDUCATION	RAPID PROGRAM DESIGN AND IMPLEMENTATION	COLLEGE OPERATIONS	STAKEHOLDER ENGAGEMENT
1. Massachusetts Competitive Partnership and Massachusetts Association of Community Colleges: Strategic initiative to lay the foundation for “Be Mass Competitive” program	X	X	X		X
2. Dallas College: Expanding financial access and process redesign for a community college system		X	X	X	X
3. Massachusetts Workforce Skills Cabinet / Commonwealth Corporation: Rapid rollout of \$250M+ in ARPA funding for workforce development in MA	X				X
4. Massachusetts Technology Collaborative (MassTech): Supported the design of a technology hub in Western MA	X		X		X
5. Business Leaders for Michigan: Community college improvement study		X		X	
6. Massachusetts Workforce Skills Cabinet / EOLWD: Design and set-up of Massachusetts Healthcare Workforce Collaborative	X	X			X
7. Bill & Melinda Gates Foundation: Strategic study of high-impact postsecondary student success interventions		X			X
8. Greater Houston Partnership: Developing a higher education strategy for the city of Houston		X	X		X
9. Mid-sized U.S. university: Analysis of higher ed trends and 'north star' opportunity areas		X		X	X
10. Lone Star College: Strategic transformation		X		X	X
11. Large U.S. state: Developing a model for postsecondary education compacts		X	X		X

Case study 1: Massachusetts Competitive Partnership - Strategic initiative to lay the foundation for the “Be Mass Competitive” program



Relevance to MACC

- Experience working with MACC
- Experience in the Commonwealth of Massachusetts and relevant stakeholders in the Commonwealth's education and workforce ecosystem
- Experience conducting landscape analyses and research on state funding models
- Experience surveying and interviewing stakeholders to define implementation needs

Context

The Massachusetts Competitive Partnership (MACP), a non-profit CEO coalition representing many of the Commonwealth's largest employers, engaged BCG to design a workforce development initiative focused on youth of color in Massachusetts.

BCG supported MACP to create a training and hiring pipeline to connect youth of color with mid-wage, career-path jobs and to identify partners and training opportunities. BCG identified MACC as the ideal partner, working with MACC to lay the groundwork for what is now the "Be Mass Competitive Program."

Approach

Our approach to this project involved:

1. Conducting a landscape analysis of the youth of color population in the Commonwealth to size and refine the target population for the initiative
2. Surveying and interviewing employers to identify suitable occupations and existing training partnerships focused on youth of color without college degrees
3. Conducting 50+ interviews with potential partners in the Commonwealth, including community-based organizations and community colleges engaged in training partners, and state-based organizations
4. Identifying potential sources of state funding and outlining a potential partnership model

Impact

In partnership with MACC and several local employers such as Bank of America, Boston Scientific, and Mass General Brigham, MACP launched the [Be Mass Competitive Program](#), offering students of color specialized training and career placement services, including up to 10 weeks of free community college classes, 10 weeks of paid training opportunities with partner employers, and an opportunity for a full-time job offer. The program saw the completion of 3 successful training cohorts in its first 1.5 years.

BCG Team

Rob Souza, Managing Director and Senior Partner, Boston
Molly Jacobson, Partner, Boston

Case study 2: Dallas College – Expanding financial access & process redesign



Relevance to MACC

- Experience working with community college affordability and benchmarking financial support
- Experience designing and implementing a funding model for an affordability program
- Experience working with community college students, faculty and stakeholders

Context

Dallas College, formerly known as the Dallas County Community College District (DCCCD) is a system of 7 community colleges serving over 75,000 students.

Since 2016, BCG has supported Dallas College with several engagements, including:

- **Rising Star Scholarship Program Review:** Reviewing Dallas College’s last-dollar scholarship and recommending improvements to optimize funds utilization to drive enrollment and student success
- **Student-Centric Scheduling:** Responding to inefficiency in course scheduling and faculty loads by developing a data-driven strategy to transition to a student-centric scheduling model

Approach

Rising Star Scholarship Program Review:

BCG took the following approach to support DCCCD with reviewing the Rising Star program:

1. Conducted a baseline analysis of the scholarship program’s current state and sized the potential market size and associated costs
2. Defined a new design and funding implications, along with building a detailed funding model
3. Socialized the blueprint for the new framework with key stakeholders, outlined the roadmap to implementation, and developed a communications plan
4. Outlined a path to program expansion based on DCCCD’s policy objectives and funding, rooted in analysis of the program’s current state as well as benchmarking of free college programs elsewhere

Student-Centric Scheduling:

Leveraging analytical capabilities, BCG partnered with Dallas College to develop advanced tools and new centralized capabilities to optimize faculty loads and course scheduling to improve student success. We:

1. Surveyed and interviewed students, faculty, and staff to understand pain points and preferences
2. Benchmarked scheduling practices against other similar/best in class institutions
3. Designed and stood up a centralized pilot team to refine structure, tools, processes and rules
4. Onboarded a full-time team and expanded from pilot to organization-wide processes
5. Built a suite of tools to predict enrollment demand and promote equity and faculty preferences

Impact

In Fall 2017, DCCCD removed the limit of new students who were eligible for the Rising Star scholarship every year, and increased the amount for [tuition and books by \\$1,500](#). Rising Star served as the predecessor to the Dallas County Promise, which celebrated [its 5th year in 2022](#) and has supported nearly 90,000 students with accessing affordable postsecondary credentials at two and four-year institutions in North Texas.

Furthermore, we later partnered with DCCCD to support its transformation into a unified institution known as Dallas College and helped design a new scheduling approach aligning schedules with students’ demand, improving persistence and completion and increasing equity for faculty by better capturing teaching preferences to manage workloads and keep section sizes consistent. Automation of scheduling improved efficiency, allowing the new process to be completed by a team of ~30, compared to ~400 previously, generating over \$2 million of the ~\$8 million steady state annual savings after piloting in 2021.

BCG served as a critical thought partner to Dallas College on change management and shifting organizational culture. Today, Dallas College is a pillar institution in its community, earning recognition and support from local employers (e.g., McKesson and Pepsi), and offering innovation programs to prepare students for in-demand jobs in Dallas such as the Construction Management program and the early childhood education program.

BCG Team

Kelsey Clark, Managing Director and Partner, Office Leader of BCG Dallas
Briar Thompson, Partner, NYC

Case study 3: Workforce Skills Cabinet/Commonwealth Corporation – Supported the rapid rollout of \$250M+ in ARPA funding for workforce development in MA



Relevance to MACC

- Experience working with Massachusetts state agencies and relevant stakeholders
- Experience understanding and addressing affordability challenges in Massachusetts
- Experience with funding mechanisms and deployment
- Experience with process improvements and communications campaigns

Context

Following the sharpest increase in unemployment and labor force dislocation in Massachusetts history due to COVID-19, the state received over \$250M in federal funds through the American Rescue Plan Act (ARPA). Funds were to be distributed to ease economic recovery via workforce training programs that would address employer hiring difficulty resulting from skills gaps/mismatch with the goal of upskilling ~12-15k workers over 3 years to fill roles in high demand occupations. The Workforce Skills Cabinet needed support to develop the right processes and scale up capacity to manage and distribute this significant inflow of new funds.

Approach

To support the WSC, BCG developed a set of processes to boost WSC capacity to handle the increase in funding and supported the fund deployment strategy. To do so, we:

1. Devised a strategy and set up a process to distribute ARPA funds; project managed distribution for 10 months before training relevant WSC staff to take over the process
2. Coordinated across 7 regional teams (and numerous other state agencies: HHS, CEC, MLSC, MassTech) to identify funding gaps and define the investment plan across key healthcare and manufacturing hubs
3. Built a dashboard to analyze and track the state's workforce statistics and fund flow
4. Evaluated and proposed improvements to current state processes and recommended technology systems and integration priorities to operationalize process over long-term
5. Wrote and launched a statewide workforce survey to engage the public and understand the barriers to training and upskilling to inform policies and programs

Impact

Following the engagement, the WSC was able to scale up its grant management processes to distribute 12M+ in funds in 2022 across 43 training providers, with a path to \$250M+ by 2025. The process was informed by public input, including 10 employer roadshows with 450+ employers in attendance, and a workforce survey

with 1000+ participants. In 2022, over 3,500 trainees were projected to participate via funded grants, and over 11,000 workers expected to be hired and trained via the new investment program.

BCG Team

Rob Souza, Managing Director and Senior Partner, Boston
Molly Jacobson, Partner, Boston

Case study 4: MassTech - Designed a Springfield, MA-based quantum technology hub as part of the Commonwealth's bid for the EDA "Regional Tech Hubs" grant



Relevance to MACC

- Experience working with a Massachusetts quasi-public agency
- Experience working with economic development in Western MA
- Experience with analytical modeling of state investment impacts and quantitative analysis of trends
- Extensive experience with stakeholder engagement, convening key stakeholders
- Experience with interviewing stakeholders to leverage expertise and develop a case for change

Context

As part of the Commonwealth's Phase I proposal for EDA funds through the Regional Tech Hubs program, BCG supported the planning and design of a regional technology hub in Western Massachusetts.

Given MA's established strength across many technology areas, past efforts to demonstrate need for federal grant funding were unsuccessful despite being home to multiple high-potential, high-need regions. MassTech required a holistic analysis of the Commonwealth's technology and regional strengths, uncovering high-potential investment opportunities. They sought to select a competitive technology and regional focus, define the Hub's vision and strategy and establish a broad consortium of partners to support the application.

Approach

BCG undertook several tasks to support MassTech and the Commonwealth in selecting a core technology area and building a consortium of supporters. Our engagement also involved collaborating closely with Springfield Technical Community College (STCC), and its president John Cook, to understand the potential for the Hub to propel workforce efforts:

1. Conducted over 200 interviews with public and private partners to build a diverse consortium including industry leaders, local community organizations, governmental support, and academic institutions
2. Leveraged industry expert interviews and desk research, preparing 9 detailed technology-area overviews across key evaluation dimensions in order to identify relative strengths and weaknesses
3. Conducted competitor analysis in technology areas outside of the Commonwealth to determine relative strength against other potential applicants
4. Evaluated workforce through comprehensive quantitative analysis of regional higher-ed graduation pipelines and composition of the current workforce within select STEM disciplines
5. Identified priority investment areas, expected economic impact, and key driving consortium partners through small-group workshops and partner 1:1s

BCG also followed an analytical process to recommend technology areas in the Commonwealth with the strongest cases for investment by evaluating the current state of each area, future potential, performance against key funding criteria and strength of partnerships, using qualitative and quantitative methods.

Impact

At the conclusion of the engagement, BCG's evaluation of potential technology areas and regions resulted in the identification of a deep tech focus area in a high-potential MSA as the most competitive application proposal, based on a holistic analysis that included:

- 100+ interviews across over 50 industry experts on MA's relative strength across tech areas
- Quantitative review across tech areas on 3 key "current-state" metrics, including the strength of the R&D ecosystem, business activity and investment, and workforce readiness

After identifying the most competitive technology area, BCG supported MassTech with refining the vision and strategy for the future hub and identified 3 high-impact Hub investment opportunities by conducting:

- Over 100 additional interviews to pressure test proposed Hub investments with industry leaders
- 3 partner workshops with ~30 participants to align towards a common vision on technology focus, community needs, and key investments

To finalize the proposal for EDA funding and achieve stakeholder buy-in, BCG:

- Coordinated letters of support across ~70 consortium members with individualized feedback for each
- Prepared application and collaborated with core partners on refinement and finalization

BCG Team

Rob Souza, Managing Director and Senior Partner, Boston
Molly Jacobson, Partner, Boston

Case study 5: Business Leaders for Michigan - Community college improvement study



Relevance to MACC

- Experience with landscape analyses of community college enrollment, completion, placement trends
- Experience benchmarking state performance against best-in-class examples from other states
- Experience developing and reporting recommendations based on best-in-class archetypes

Context

Business Leaders for Michigan, a coalition of industry leaders interested in growing the state's economy, engaged BCG to identify opportunities for improvement in Michigan's community college system, using an analytical approach that assessed the current state in Michigan and utilized benchmarks and assessments of other states to identify best-in-class community college systems.

Approach

Our approach to this project included:

1. Structuring research and analysis by organizing measurements of community college performance around three major phases of the student experience: enrollment, completion, and placement

2. Benchmarking community college performance against other states, identifying leading & lagging areas
3. Determining the greatest areas of need by observing school-level trends within the state

Impact

Our final deliverables to Business Leaders for Michigan included recommended priority improvement areas and case studies detailing the design and impact of innovative programs implemented by other states and colleges. We also developed a summary of levers for improving student outcomes at each phase of their journey.

Following our engagement, Business Leaders of Michigan published a public report, titled [“Building a world-class community college system,”](#) which outlined BCG’s research and data on the current state of community college in Michigan, case studies and benchmarks from leading states, as well as a series of recommendations

BCG Team

Tejus Kothari, Managing Director and Partner, Chicago
Jonathan Nipper, Managing Director and Partner, Detroit

Case study 6: Massachusetts Workforce Skills Cabinet / EOLWD – Supported the design and set-up of the Massachusetts Healthcare Workforce Collaborative



Relevance to MACC

- Experience convening a diverse set of stakeholders across the Commonwealth ecosystem, including higher education and community colleges
- Experience using analytical capabilities to derive insights surrounding labor and the workforce
- Experience with developing funding projections and implementation plans to act on strategic priorities

Context

BCG partnered with the Massachusetts Workforce Skills Cabinet (EOLWD, EOHED, EOE) and EOHHS over a three-year period to identify the state’s largest labor gaps and pinpoint areas of critical need, and to convene a public-private collaborative of key state leaders to specifically address healthcare workforce gaps.

Approach

BCG’s approach to the project happened in three phases:

1. Phase 1, we used public labor market data, Burning Glass, interviews, and BCG data and analysis to identify healthcare occupational groups with largest projected supply gap
2. Phase 2, we designed and coordinated the convening of a state healthcare collaborative, convening 45 public, private, and social sector entities with a vested interest in the healthcare workforce, including higher education and community college leaders
3. Phase 3, we facilitated sub-groups focused on behavioral health, direct, care, and nursing to produce detailed strategies (including projected costs and impact) to address labor needs in each sub-group

Impact

Over three years, the Collaborative has grown to over 100 members and represents a diverse set of stakeholders across the Commonwealth’s government, industry, educational and public/quasi-public sectors.

Higher education leaders, including from MA community colleges, represent a portion of Collaborative members. The Collaborative continues to meet and use the implementation plans supported by BCG.

BCG Team

Rob Souza, Managing Director and Senior Partner, Boston
Molly Jacobson, Partner, Boston

Case study 7: Bill & Melinda Gates Foundation – Strategic study of high-impact postsecondary student success interventions



Relevance to MACC

- Experience with higher education and analyzing current trends in student success interventions
- Experience with benchmarking two- and four-year higher education institutions
- Experience with investment strategies in higher education

Context

We partnered with the Bill & Melinda Gates Foundation (BMGF) over several years to research several factors relevant to postsecondary success, particularly for underrepresented and minority students.

Approach

During our engagement with BMGF, the key efforts included:

- **Mega-models:** BMGF identified three large public U.S. institutions working towards the objective of student success for minority students and engaged BCG to develop a framework for others looking to do the same. BCG prepared case studies on improving outcomes in a cost-effective manner, defining enabling key interventions, operating capacities, and contextual factors and outlined best practices
- **Digital learning ROI:** To help BMGF understand the economics and success drivers of online learning in higher ed, BCG analyzed costs and benefits of digital implementations, including online and blended programs for a sample of two- and four-year institutions, and gathered insights into factors that amplified the ROI. Findings were synthesized into a paper, [Making Digital Learning Work](#).
- **Student success interventions ROI:** BCG helped BMGF study the ROI of student success interventions (reforms to advising, developmental education, and emergency aid) at institutions serving low-income, traditionally underrepresented student groups. The team scanned literature; created a cost-benefit assessment methodology; conducted case studies to understand the enablers and success factors; and created vignettes on exemplar programs. A report, titled [Turning More Tassels](#), was also published.
- **Tech-enabled advising:** Helped BMGF to develop a market segmentation and investment strategy to accelerate advising redesign in higher education and improve ROI of advising technology. The team conducted over 160 hours of interviews and a student survey (n=951); developed segmentation of institutions to determine technical assistance needed; developed view of advising technology and structural barriers constraining advising ROI; and identified next steps and implications for investments

Impact

Across all of these projects, BCG helped BMGF refine its own understanding of approaches to enhance postsecondary student success, which in turn influenced the Foundation's investment strategy. In addition, several of these involved producing public reports summarizing the findings, which have been critical

contributions to the postsecondary success research field.

BCG Team

Allison Bailey, Managing Director and Senior Partner, Boston
Lane McBride, Managing Director and Senior Partner, Washington, DC
Molly Jacobson, Partner, Boston

Case study 8: Greater Houston Partnership - Developing and supporting the implementation of a strategy for Houston's higher education ecosystem



Relevance to MACC

- Experience working with a place-based coalition
- Experience convening stakeholders across the business and higher education ecosystems
- Experience developing a case for change by analyzing historical and current states, as well as benchmarking best-in-class examples
- Experience with higher education funding

Context

Over several years, BCG has partnered with the Greater Houston Partnership, a local economic development organization bringing together senior leaders from Houston's major industries, to develop and implement a strategy for the City of Houston's higher education ecosystem.

The initial objective of our work was to identify opportunities for collaboration between higher education and business to improve educational outcomes and prioritize areas of focus to position Houston as a national leader in higher education. Since then, BCG has supported GHP with several initiatives, including a funding plan to achieve top-50 status for a public higher education institution, and a college-to-work talent pipeline strategy.

Approach

Developed a vision, strategy and roadmap for Houston's higher education ecosystem

BCG took the following approach to support GHP with the development of its initial higher education strategy:

1. Developed a fact base describing the historical performance and current state of higher ed in Houston
2. Studied examples of partnerships and collaborative programs in other cities to identify leading practices and innovative models to be applied to Houston
3. Developed a framework to identify and prioritize options that leveraged the strengths of the region
4. Proposed "no regret" and "transformative" initiatives supported with an implementation roadmap

Supported several initiatives to advance on the higher education strategy

Enhancing the city's talent pipeline

1. Conducted interviews with students, career services at colleges, and recruiters to understand pain points and barriers to recruiting
2. Proposed solutions to the consortium to sponsor and implement, including designing a professional-to-student mentorship program
3. Recommended measures to increase the number of college seniors obtaining full-time employment

Developing a funding plan to secure more state funding for public education

1. Conducted analysis to holistically describe the economic and societal value of a Top 50 institution
2. Raised awareness of the value of an additional Top 50-ranked university for Texas

Impact

Our initial engagement with GHP resulted in the definition of a clear aspiration for Houston’s higher education ecosystem and initiatives to pursue for the following year including targets. The findings were socialized with education leaders and businesses to gather support, commitment, and funding.

We later supported the design and implementation plan of a citywide professional-to-student mentorship program, working with a local partner to strengthen the higher education to workforce pipeline. This produced a playbook for mentoring programs, including guidance on partner selection, program design, fundraising and mentor recruitment. Further, to advocate for state funding, we developed a report outlining the economic benefits of a strong higher education institution and presented it to the Governor's office.

BCG Team

J Puckett, Managing Director and Senior Partner, Dallas
Jeff Shaddix, Managing Director and Partner, Houston
Renee Laverdiere, Managing Director and Partner, Houston

Case study 9: Analysis of higher ed trends and “north star” opportunity areas for a mid-sized, U.S. university

Relevance to MACC

- Experience conducting a landscape assessment of higher education trends, including using data analytics to evaluate current state and develop future projections
- Experience with benchmarking and evaluating positioning relative to peers
- Experience interviewing students, faculty, university leadership, and peer universities
- Experience with defining strategic priorities and socializing them to generate stakeholder buy-in

Context

BCG worked with this university to conduct an in-depth analysis of higher education trends and develop “north star” opportunities for the university’s strategic planning. Specifically, the client engaged BCG to:

1. Conduct an assessment of the higher education landscape, with a specific focus on student success, enrollment, online/graduate education, and research
2. Evaluate positioning in comparison to peer institutions
3. Provide strategic planning best practices to the core team
4. Serve as a thought partner while the university builds out potential strategies and socializes them

Approach

To complete the analysis, BCG:

1. Conducted interviews and held focus groups/panels with university leaders, faculty, staff, students, to understand the university's current positioning and areas for opportunity

2. Analyzed university data to assess performance relative to peers and areas for future development
3. Benchmarked comparable institutions, devised targeted case studies to understand innovative and leading programs/practices in higher ed, and understand how peers are driving excellence
4. Conducted research to understand relevant national trends in higher ed, articulating implications
5. Synthesized findings to develop and socialize high-level potential 'north stars' to guide strategy
6. Provided preliminary considerations for next steps, strategic enablers, and key capabilities needed

Impact

At the conclusion of the engagement, BCG was able to:

1. Provide university leaders with a comprehensive view of higher ed trends and opportunities
2. Help leaders understand their strategic positioning relative to peers
3. Develop a shortlisted set of potential north star concepts, and further socialized, workshopped, and refined these ideas to drive alignment and buy-in across stakeholders
4. Provide university leadership with an understanding of the enablers required for the next phase of strategic planning, including elements such as faculty, staff, funding, facilities, partnerships, etc.

BCG Team

Tejus Kothari, Managing Director and Partner, Chicago
Sacha Litman, Partner and Associate Director, San Diego

Case study 10: Lone Star College - Strategic transformation of a community college



Relevance to MACC

- Experience benchmarking current state and best-in-class examples in community colleges
- Experience engaging and interviewing community college stakeholders
- Experience with community college organizational structure and talent dynamics

Context

Lone Star College is a community college that serves over 90,000 students in the Greater Houston area. They requested support reviewing their current administrative organizational structure and business practices to further their “one college” model and assess opportunities to increase organizational efficiency. We supported Lone Star in developing recommendations for shifting to a more systemwide approach by growing shared services, identifying cost savings opportunities, right-sizing, outsourcing, and growing while maintaining current its cost structure, and developing recommendations for the role of campus leadership.

Approach

BCG conducted the following activities over the course of the engagement:

1. Conducted stakeholder interviews to assess current organizational structure
2. Implemented proprietary BCG tools to assess organizational structure, culture, and effectiveness
3. Benchmarked other structures & shared services, synthesized advantages of potential structures
4. Identified opportunities to increase efficiencies via shared services
5. Developed a roadmap of proposed changes and shared a perspective on longer term opportunities

Impact

BCG's support to Lone Star College enabled a shift to a more systemic approach for the college in order to increase the efficiency of its operations. The newly identified and evolved roles for campus presidents enabled them to spend more time on student success initiatives and position their campuses for growth, while the reconfigured leadership roles allowed for improved attraction and retention of talent.

BCG Team

Jeff Shaddix, Managing Director & Partner, Houston

Renee Laverdiere, Managing Director & Partner, Houston

Case study 11: Supported success for postsecondary education compacts for a U.S. state

Relevance to MACC

- Experience with higher education at the statewide level
- Experience conducting a landscape analysis to identify current state and best practices
- Experience working with the topic of higher education affordability

Context

Higher education leaders in the state were committed to accelerating progress across their state, so formed a Council and finalized a set of ambitious goals such as increasing affordability and accessibility to enhance student outcomes. To deliver on these goals, BCG was engaged by a nonprofit to develop a collaboration model and the supporting infrastructure that would allow the Council to deliver against these shared goals.

Approach

BCG focused on rapid baselining & socialization to shape the supporting infrastructure. Key efforts included:

1. Aggregating learnings and generated insights from over 15 facilitated stakeholder discussions
2. Current state assessment including trends and areas of opportunity, landscape of in-flight efforts underway, and collaboration best practices to capture learnings from other similar efforts
3. Options and recommendations for collaboration model implementation

Impact

At the conclusion of the engagement, BCG had achieved the following:

1. Developed framing and supporting infrastructure for the collaboration model
2. Identified and aligned on a set of priorities for intersegmental collaboration based on the most crucial and those with highest impact
3. Developed implementation materials to support the collaboration model launch

BCG Team

Daniel Acosta, Managing Director and Partner, Los Angeles

Nicole Bennett, Managing Director and Partner, San Francisco



4. Our team

4.1. Overview of leadership team for this project

We will bring to this effort a seasoned team of leaders with deep knowledge of Massachusetts and of higher education. Our leadership team will remain consistent throughout the project and is summarized below. Professional bios are included in [Appendix A](#).

Leadership team

The leadership team will guide the overall direction of the project and help prioritize efforts throughout. They will be responsible for identifying and raising key decision points to the Steering Committee.

- **Rob Souza, Managing Director and Senior Partner and Northeast System Lead:** Rob oversees BCG's offices in Boston and New York. He has co-led much of BCG's recent work with Massachusetts across Secretariats and agencies such as the EO of Housing and Economic Development, the EO of Labor and Workforce Development, and the City of Boston. He helped to found BCG's advanced analytics practice.
- **Tejus Kothari, Managing Director and Partner and U.S. Higher Education Topic Lead:** Tejus is a core member of BCG's Public Sector, Social Impact, and Education, Employment and Welfare Practices. He has deep experience supporting higher education institutions, state and local governments, large employers, investors, and foundations drive impact in the rapidly changing education and future of work landscape.
- **Molly Jacobson, Partner:** Molly is a core member of BCG's Education, Employment, and Welfare and Public Sector practice areas. Molly has extensive experience leading strategic workforce and economic development projects across the Commonwealth. She managed BCG's initial engagement with the

Massachusetts Competitive Partnership that laid the foundations of the “Be Mass Competitive” program. She also led work to study postsecondary student success interventions including emergency financial aid and advising reforms.

Subject matter experts

Our team will draw upon subject matter experts who can advise on project recommendations, provide expertise on functional topics, and share insight and best practices regarding adoption barriers, stakeholder engagement, and more.

- **Sara Enright, Subject Matter Expert:** Sara is an experienced higher education and workforce development leader. She spent six years as the Vice President of Student Affairs and Chief Outcomes Officer at the Community College of Rhode Island, where she led enrollment, advising, financial aid, counseling, athletics, and all student affairs functions for more than 15,000 students. Sara was also the architect and implementation leader for the Rhode Island Promise free college initiative and is a fierce advocate for student-centered education and equity.
- **Allan Dobrin, Senior Advisor:** Allan is the Former Executive Vice Chancellor and COO at the City University of New York (CUNY). While at CUNY, Allan implemented several key initiatives, including the CUNY Task Force on Sustainability, and CUNYFirst, to streamline university processes and efficiently utilize resources. He is also the former Executive Director of the Mayor’s Commission on Special Education, and Director of Management Services, and the former Commissioner and CIO at the Department of Information Technology and Telecom. He brings deep experience across state and local government agencies, authorities, education institutions, and healthcare organizations.
- **Lisa Vura-Weis, Partner and Associate Director, Public Health Systems:** Lisa is a Partner and Associate Director in the Boston office and a core member of our Public Sector practice. For several years, she served as a Senior Advisor to then-Governor Gina Raimondo of Rhode Island. Lisa led state-wide health policy efforts, served as Acting Secretary of Health and Human Services, and stood up the state’s COVID-19 response during her tenure with the State of RI.
- **Lina Bankert, Managing Director and Partner:** Lina is a core member of BCG’s Public Sector Practice Area, with primary focus in Education, Employment, and Welfare, based out of the Chicago office. Her work sits at the intersection of K-12, postsecondary education, and workforce systems, and she has extensive experience facilitating change between private and social sector organizations. She has supported a range of strategic planning, market analysis, performance and sustainability improvement, organization design, talent pipeline development, and change management efforts, and has worked closely with a statewide education collaborative in Tennessee.
- **Linda Lorimer, Senior Advisor:** Linda has had an expansive career in helping various scales of institutions both in the US and abroad to design and build strategic initiatives. For over thirty years, she was a leader at Yale University, where she served as Vice President for Global & Strategic Initiatives for over a decade. Prior to her strategy role, she held various positions at Yale in HR, marketing, communications, crisis management, sustainability, the Yale Press, university governance, and served as President of Randolph-Macon Women’s College. Additionally, her service on five boards includes two in the education sector.

- Nithya Vaduganathan, Managing Director and Partner:** Nithya is a core member of the Education, Employment and Welfare Practice out of the Boston office with deep experience and expertise across the full education spectrum. She is a former BCG Henderson Institute Fellow on the Future of Work through which she has partnered with HBS. Nithya has worked closely with the Bill and Melinda Gates Foundation on better understanding what drives student success in higher education, and the role of digital learning in higher ed, including co-authoring two public reports on these topics alongside the Foundation.

The below table summarizes the **specific expertise and skill set of the leadership team and senior experts** you will get on the ground for this project, with detailed biographies provided in the Appendix.

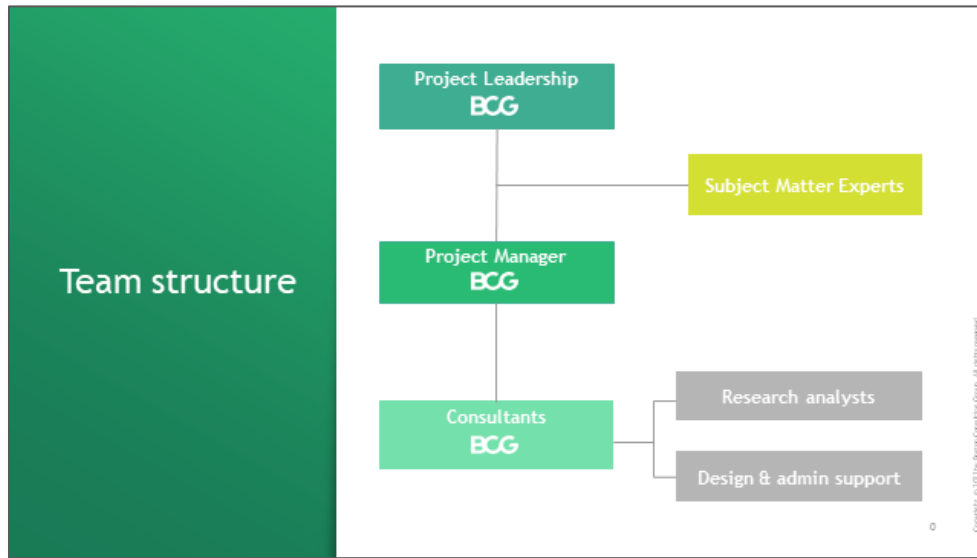
	MA GOVERNMENT EXPERIENCE	HIGHER EDUCATION EXPERIENCE	ORGANIZATIONAL TRANSFORMATION	STAKEHOLDER ENGAGEMENT	RAPID PROGRAM DESIGN/IMPLEMENTATION
Leadership Team					
Rob Souza	X	X	X	X	X
Tejus Kothari		X	X	X	X
Molly Jacobson	X	X	X	X	X
Core Project Execution Team					
Fully dedicated project manager	<i>Diverse backgrounds – see below for illustrative bios</i>				
Illustrative consultants/research analysts	<i>Diverse backgrounds – see below for illustrative bios</i>				
Experts					
Sara Enright		X	X	X	X
Allan Dobrin		X	X		X
Art Nevins		X	X	X	X
Lisa Vura-Weis	X		X	X	X
Lina Bankert		X	X	X	X
Linda Lorimer		X	X	X	X
Nithya Vaduganathan		X	X		X

4.2. Overview of the working team structure for this project

In addition to our leadership and expert team, the structure of our team will include:

- One **project manager** who will be responsible for coordinating the day-to-day work, identifying decision points, defining options, developing recommendations, and communicating project progress.
- 2-3 consultants**, who will collect data, conduct analyses, identify benchmarks and best practices, and develop the recommendations needed to deliver this project.
- Dedicated **research analysts, design specialists, and administrative assistants** who can support our team as needed throughout the project.

Please see below for an illustration of our planned full team structure.



The exact working team composition for this project will depend on the start timing. Below are representative profiles, so you understand who may be working with your teams in a day-to-day capacity. We will allow you to review the resumes and confirm each member of the working team before they commence.

Potential project managers (please see appendix for detailed project manager bios):

- **Nicky Axmann** is a Project Leader in BCG’s Boston office and is a core member of the Public Sector practice with experience across economic development and workforce topics with a range of State and Local governments in the Northeast. Prior to joining BCG, Nicky lived for 3+ years in Zambia and India and worked on large-scale social, economic, and infrastructure programs. He holds a B.S. in Economics from Duke University and an MBA and MPP/ID from Harvard University.
- **Tori Berquist** is a Project Leader in BCG’s Boston office. Before joining BCG, Tori worked as a medical doctor and advised state government on various issues pertaining to health and human services. Tori holds an MPP from the Harvard Kennedy School, where she completed her capstone with the Massachusetts EOHHS, and an MD from Monash University, Australia.

Potential consultants and analysts

- **Olivia Arnold** is a Consultant at BCG. Since joining BCG, Olivia has worked closely with public sector clients on topics surrounding social impact, education, workforce, and economic development, including extensive experience with Massachusetts’ public sector agencies and the City of Boston. Olivia worked on BCG’s engagement with the MACP that laid the foundations of the “Be Mass Competitive” program. Olivia holds a B.S. from Vanderbilt University.
- **Claire Chen** is a Consultant at BCG, focusing primarily on education and social impact with a focus on strategy, product development, and due diligences. At BCG, Claire has experience supporting a large

community college client with implementing its unified organizational design strategy and student-centric scheduling system. Claire earned her B.A. from Harvard University, and an MBA from Stanford University.

- **Tamara Minott** is a Consultant at BCG. Prior to BCG, she worked in enrollment management at a highly selective university where she led recruitment initiatives that included expanding access for students from historically and presently underserved backgrounds. Tamara earned her PhD in Higher Education, her Masters in Education and Social Policy, and her Graduate Certificate in Project Management at NYU.
- **Meghan McQuiggan** is a Knowledge Expert at BCG, and a core member of BCG's Public Sector and Education, Employment, and Welfare practice. She has expertise and experience across all sub-sectors of education, including K-12, higher ed, edtech, and workforce development. At BCG, Meghan has supported a mid-sized university client with analyzing higher education trends and has synthesized key trends in community college student success, including hybrid learning models and serving students with children. Meghan received her MPP, concentrating in Education Policy and Program Evaluation from George Washington University and a graduate certificate in Education Finance from Georgetown University.
- **Brad Allan** is a Lead Knowledge Analyst in BCG's Washington D.C. office, and a core member of BCG's Public Sector and Education, Employment, and Welfare practice. He has deep knowledge of and experience in education, upskilling, workforce development, and data analytics. Brad has written extensively about education and employment topics, including a policy paper on incentives in education and articles on talent-driven economic development. Prior to BCG, Brad spent ten years at an R&D laboratory at Harvard University, where he led the implementation of large-scale field experiments in K-12 education.
- **Angelina Snegach** is a Knowledge Analyst in BCG's Washington D.C. office, and a core member of the Public Sector and Education, Employment and Welfare (EEW) practices. She has recent experience supporting U.S. state clients at the intersection of higher education and economic development, and actively contributes to BCG's knowledge assets in education, workforce, and social services topics. Angelina received her B.A. in International Affairs and Urban Studies from Northeastern University, during which she completed a 10-month co-op with BCG's Public Sector practice in the Boston office.

We will ensure that MACC benefits from the full depth of our bench, and we will engage collaboratively with you to make sure we have the right team every step of the way.

5. Budget

We are confident that our proposal represents the best value to the Massachusetts Association of Community Colleges, and to the Commonwealth.

Based on our current understanding of the required scope for this effort, all-in fees for this effort would normally be \$1.26M. However, BCG believes that expanding access to quality education is critical for driving equitable economic and social outcomes. To this end, BCG will invest \$270k of our fees for this work through our Boston office and our Social Impact practice area, reducing our **total firm-fixed-price for this effort to \$990k**. This price includes any subcontractors who may be involved in the work.

6. References

1. Robert LePage

Assistant Secretary for Career Education, MA Exec Office of Education
617-285-0123

Robert.lepage@mass.gov

Project reference: Commonwealth of Massachusetts ARPA Funding Strategy (Case study 3, above);
Massachusetts Healthcare Workforce Collaborative (Case study 6, above)

2. Patrick Larkin

Deputy Director, MassTech and Director of MassTech Innovation Institute
413-822-0463

larkin@masstech.org

Project reference: MassTech regional technology hub (Case study 4)

3. Jay Ash

Executive Director, Mass Competitive Partnership and former MA Secretary of Economic Development
617 680 0013


jash@masscompetes.org

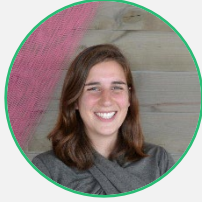
Project reference: Massachusetts Competitive Partnership Workforce Development Initiative (Case study 1)

Appendix A - Resumes and detailed biographies

Leadership team

<p>Rob Souza</p> <p>Leadership team Boston, MA</p>  <p>Education</p> <p>S.B., Massachusetts Institute of Technology</p>	<p>Profile summary</p> <ul style="list-style-type: none"> Rob Souza is a Senior Partner & Managing Director in BCG's Boston office and the Northeast System lead. He has a deep relationship with the Commonwealth of Massachusetts and has partnered with state and city governments to develop strategies to achieve their core missions and optimize their operations to deliver best-in-class results to residents Rob co-led BCG's recent work with Massachusetts, partnering with the Executive Office of Housing and Economic Development, the Executive Office of Labor and Workforce Development, and the City of Boston <p>Relevant project experience</p> <ul style="list-style-type: none"> Rob has co-led some of BCG's largest recent economic development and workforce engagements with the Commonwealth of Massachusetts, including a recent effort to deploy \$250M in ARPA funding for workforce development, and an effort with the City of Boston to revitalize the downtown COVID-19 response: Designed a post-COVID economic re-opening strategic plan in conjunction with BCG GAMMA (data analytics team) for a State in the US; Strategized to scale-up call
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<p>MBA, Harvard Business School</p>	<p>center operations and to transition operation from physical to remote during the COVID-19 crisis for a government body</p> <ul style="list-style-type: none"> • Plan rollout for new funding and capacity-building initiatives for workforce development for an agency of a US state government • Supported in a customer experience strategy for a postal services operator · Developed an implementation / change management strategy as follow on to a hybrid-digital product offering and strategy for a logistics agency of the US Government • Assisted with reinvention of US retail and the hyper-growth of omnichannel services for an office supplies retailer • Improved client's category profitability through changes to category strategy and reduced cost of goods sold (COGS) for a discount club retailer
<p>Tejus Kothari</p> <p>Leadership team Chicago, IL</p>  <p>Education</p> <p>S.B., Massachusetts Institute of Technology</p> <p>MCP, Massachusetts Institute of Technology</p>	<p>Profile summary</p> <ul style="list-style-type: none"> • Tejus Kothari is a Managing Director and Partner in BCG's Chicago office and a leader in BCG's Education, Employment and Welfare Practice and BCG's Innovation Practice. Tejus has served universities, ed tech companies, large employers foundations on strategy and organizational efforts with a significant focus on meeting dynamic workforce needs and accelerating models for R&D and innovation. • Tejus also has experience engaging with some of the world's top business schools on strategic efforts, partnering with the Gates Foundation on student success and measuring student learning, and supporting a set of geographies to comprehensively address learning loss as result of the COVID-19 pandemic. <p>Relevant experience</p> <ul style="list-style-type: none"> • Led comprehensive review of community colleges in state of Michigan in early 2023, leading to a concrete set of systemic recommendations, several of which have been immediately pursued by the state and community college leaders • Led development of strategy, business plan and economic impact analysis of a multi-billion-dollar initiative spearheaded by a state government and major public university system to transform workforce development, catalyze innovation and economic growth and drive mobility and inclusion across the state • Supported a large PK-12 state education agency in developing a vision, identifying set of strategic priorities, developing initiatives aligned to the strategic priorities and building implementation capabilities and capacity • Supporting a range of strategic efforts for higher ed institutions and not-for-profit organizations in the wake of COVID-19 • Supported many universities & public systems on online and digital education, new program/college launch, reimagining the student experience, marketing and stakeholder engagement, organizational structures, etc. • Led a strategic planning development process for a top 25 business school <p>Prior experience</p> <ul style="list-style-type: none"> • Prior to BCG, Tejus helped launch Everspring, a start-up in the higher education space which partners with not-for-profit universities to achieve excellence in online education.
<p>Molly Jacobson</p> <p>Illustrative project manager Boston, MA</p>	<p>Profile summary</p> <ul style="list-style-type: none"> • Molly Jacobson is a Partner in BCG's Boston office. Molly's recent work has focused on the nexus of the public sector (state and local government) and education, healthcare, employment, and welfare practice areas, working closely with the Commonwealth of Massachusetts among other Northeast states.



Education

B.A., Brown University
 MBA, Harvard Business School
 MPP, Harvard Kennedy School

- Recent engagements with Massachusetts include supporting the Executive Office of Economic Development to rapidly facilitate input into the Commonwealth’s Economic Development Plan; the development of the initial COVID-19 reopening guidelines, the revitalization plan of the Downtown district in the City of Boston, and the strategic deployment of federal COVID funding for the Massachusetts workforce department as well as the creation of the Massachusetts Healthcare Collaborative.

Relevant project experience

- In-depth interviews and workshop on housing in Providence, RI to inform the incoming mayor’s 12–24-month strategic plan
- Downtown revitalization strategy for the Mayor's Office of a major US city looking to address foot traffic declines coming out of the pandemic
- Strategic deployment of federal ARPA dollars for workforce development purposes, including PMO and planning, working closely with the Governor's Workforce Skills Cabinet of Massachusetts
- Manufacturing growth strategy for a US state looking to bolster its presence in both the life sciences and defense industries
- COVID economic recovery strategy spanning business, workforce, and community/regional development for a state office of Housing and Economic Development
- COVID re-opening strategy for a state government body, including cross-agency PMO and the creation of an automated dashboard to monitor state economic health
- Rapid scaling of a state unemployment call center by 20x in <1 month during the pandemic
- Workforce development strategy focused on healthcare labor shortages
- ROI analysis of higher education student success interventions culminating in the report “Turning More Tassels,” published in tandem with the Bill & Melinda Gates Foundation

Additional subject matter experts

Boston Consulting Group

Sara Enright

Subject matter expert
 Providence, RI



Education

B.A., Dartmouth College
 MBA, Harvard Business School

Profile summary

- Sara Enright is an experienced higher education and workforce development leader. She spent six years as the Vice President of Student Affairs and Chief Outcomes Officer at the Community College of Rhode Island, where she led enrollment, advising, financial aid, counseling, athletics, and all student affairs functions for more than 15,000 students.
- She was also the architect and implementation leader for the Rhode Island Promise free college initiative and a fierce advocate for student-centered education and equity.

Prior experience

- Prior to her work in higher education, Sara led the first expansion site for Year Up and spent 10 years helping to scale Year Up across the nation. Year Up is now recognized as one of the nation’s leading workforce development organizations.
- She also has experience in healthcare, economic development, management consulting, and technology. A graduate of Dartmouth College and Harvard Business School, Sara currently resides in Providence, Rhode Island.

Allan Dobrin

Subject matter expert
New York, NY



Education

B.S., Queens College
PhD, City University of New York

Profile summary

- Allan has deep expertise and relationships across NY State and NYC local government agencies, authorities, education institutions and healthcare organizations, including leadership positions at the City University of New York, within the city’s Department of Information Technology and Telecommunications, and several Mayors’ offices. He also has functional expertise in leadership, business transformation, change management, operations and using technology to improve government services.
- As the Former Executive Vice Chancellor and COO at the City University of New York (CUNY), Allan implemented several key initiatives, including the CUNY Task Force on Sustainability, and CUNYFirst, to streamline university processes and efficiently utilize resources.

Relevant project experience

- Prior to BCG, Allan held the following positions:
 - Executive Vice Chancellor and Chief Operating Officer, The City University of New York
 - Commissioner, NYC Department of Information Technology and Telecommunications
 - Executive Deputy Director, NYC Mayor’s Office of Operations
 - Chief of Staff, Deputy Mayor for Education and Human Services, Mayor’s Office City of New York
 - Deputy Executive Director for Operations, Bellevue Hospital
 - Deputy Executive Director for Special Education, NYC Department of Education
 - Executive Director of Mayor’s Task Force for Youth
 - Adjunct Professor, Executive Master’s Program Baruch College, CUNY

Art Nevins

Subject matter expert
Providence, RI



Education

B.A., Rutgers University
M.A., Harvard Graduate School of Education

Profile summary

- Art served as a K-12, Higher Education, and Workforce Policy Advisor to former Rhode Island Governor Gina Raimondo. In this role he designed and developed initiatives aligned to the Governor’s goal to improve the state’s educational attainment rate to 70%, including higher education innovation, college access, and college attainment initiatives. Art also served as liaison to the state’s Office of Postsecondary Education, state community college and 4-year college institutional leadership.

Relevant project experience

- Researched and developed the policy, legislative and financial model for the Rhode Island Promise program, a free community college initiative, which has provided graduating high school students in RI with two years of free community college tuition. RI Promise has successfully reached thousands of students and increased the state’s college-going rate by 9%, doubled the number of low-income students attending community college, increased the percentage of students of color in community college by 63%, and quadrupled the colleges’ graduation rate.
- Designed the coordinated state-wide plan to increase Rhode Island’s college attainment rate to 70%, through higher education reforms, college access and completion initiatives.
- Led a cross-agency initiative to increase the workforce preparedness of Rhode Island youth including through the expansion of career and technical programming, high school internships, and courses in workforce exposure.
- Developed and led implementation of the Providence Public School District’s fall 2020 school re-opening operations and academic plans, which resulted in Providence becoming one of few cities nationally to fully and safely re-open schools for the academic 2020/21 school year.
- Designed teacher apprenticeship program guidance for higher education institutions and school districts in a southern state.

- Created a project management system and provided implementation support for a mid-sized urban school district in upstate New York.

Lisa Vura-Weis

Subject matter expert
Boston, MA



Education

B.A., Harvard University
MPA, Princeton University
MBA, Columbia University

Profile summary

- Lisa is a Partner & Associate Director in BCG’s Boston office. Prior to BCG, she was the Acting Secretary of Health & Human Services for former Governor Gina Raimondo in Rhode Island and led statewide health policy efforts. In that role, she chaired the RI Children’s Cabinet and advanced policies to support the health & wellbeing of children and families in the state. In addition, she was deeply involved in transformation efforts focused on IT, HR, and Procurement for the state.
- At BCG, Lisa is a member of the Public Sector and Health Care practice areas and works with state & local clients to build more equitable, resilient health systems.

Relevant project experience

- Led Rhode Island’s health & human services secretariat, with oversight across Medicaid, behavioral health, child welfare, and public health
- Oversaw the development and execution of a gubernatorial Behavioral Health Executive Order focusing on enforcing parity and expanding access in RI
- Launched adult and youth cross-agency working groups to examine gaps in the behavioral health service array and develop strategic plans to address them

Prior experience

- Lisa was a Consultant and Project Leader in the Boston office from 2012-2015, prior to leaving for public service.
- Lisa also served as VP of HR Operations at FM Global, a Fortune 500 commercial property insurer, where she established an HR shared services organization and led Future of Work efforts.

Lina Bankert

Subject matter expert
Chicago, IL



Education

B.A., Princeton University
MBA, Stanford University

Profile summary

- Lina joined the Boston Consulting Group in 2022 and is a Managing Director and Partner in the Chicago office. She is a core member of the Public Sector Practice Area, with primary focus in Education, Employment, and Welfare. Her work sits at the intersection of K-12 and postsecondary education and workforce systems, and she has extensive experience facilitating change between private and social sector organizations. She has supported a range of strategic planning, market analysis, performance and sustainability improvement, organization design, talent pipeline development, and change management efforts.

Relevant project experience

- Led collaborative efforts with state intermediaries, districts, postsecondary institutions, and employers to diversify and grow talent pipelines through expanding college and career-ready instructional models
- Advised state education agencies and districts on numerous learning acceleration and recovery efforts, both as strategic performance improvement and during the COVID crisis
- Led transformation and innovation strategy with higher education institutions and government agencies, focused on growth, sustainability, and economic development
- Partnered with national and place-based foundations across the country on a range of strategic efforts and initiatives (e.g., collective impact, neighborhood revitalization, whole child/ expanded learning, postsecondary access and success)
- Defined practices and pathways for organizations embarking on making talent pipelines more equitable and inclusive through fair chance hiring

	<p>Prior experience</p> <ul style="list-style-type: none"> • Prior to BCG, Lina was a Partner with Bellwether Education and co-led the Strategic Advising Practice Area as an expert in K-20 education. There, her clients included state education agencies, school operators (districts, charter management organizations, and independent school networks), foundations and intermediaries, community collaboratives, and education service providers. Lina also has a decade of experience in management consulting and investment banking, both as a generalist and as a specialist in the Education and Knowledge Services sectors.
<p>Linda Lorimer</p> <p>Subject matter expert New York, NY</p>  <p>Education</p> <p>B.A., Hollins College J.D., Yale University</p>	<p>Profile summary</p> <ul style="list-style-type: none"> • Linda Lorimer is a project advisor and expert on higher education. From 1993-2016, she served as a direct report to the President of Yale University. During the last decade of her tenure, her work focused on developing and building Yale's online education strategy. She also led major strategic initiatives at the University. In total, she has nearly 40 years working in higher education. • Linda is currently a director of Pearson, LLC, the world's largest learning company. Past board directorships include McGraw-Hill (where she was Presiding Director) and three telecom companies <p>Relevant experience</p> <ul style="list-style-type: none"> • Over 40 years in higher education, and 16 years as a direct report to the President of Yale University • As Yale's VP for International and Strategic Initiatives, she worked with universities in more than a dozen countries to develop innovative partnerships and joint ventures • Linda's other responsibilities at Yale included: <ul style="list-style-type: none"> – Office of Digital Dissemination (creating and implementing Yale's online education strategy and the distribution of the University's educational assets worldwide) – Office of Public Affairs and Communications, Licensing Office, and Broadcast Center (overseeing Yale's communications efforts, marketing functions, and licensing operations worldwide) – Yale University Press (overseeing the largest academic publisher in the U.S. as it expanded globally and through internet channels) <p>Prior experience</p> <ul style="list-style-type: none"> • Linda also served as the President of Randolph-Macon Woman's College from 1987-1993. Under her leadership, she helped the College achieve financial stability while also building its fundraising infrastructure and expanding enrollment. • A recognized expert in higher education governance, she is the recipient of the American Bar Association's Award for Board Governance and is a past Chair of the Board of the American Association of Colleges and Universities.
<p>Nithya Vaduganathan</p> <p>Subject matter expert Boston, MA</p>	<p>Profile summary</p> <ul style="list-style-type: none"> • Nithya is a Managing Director and Partner in BCG's Boston office and a core member of the U.S. Education Leadership Team. She has deep experience in higher education and ed-tech and has supported many educational strategy, organization, and transformation efforts. • Nithya has worked closely with the Bill and Melinda Gates Foundation on better understanding what drives student success in higher education, and the role of digital learning in higher ed, and recently co-authored two reports titled "Making Digital Learning work" & "Turning More Tassels" (on advising reform). <p>Relevant project experience</p>



Education

B.A., Stanford University
M.S., Stanford University
MBA, Harvard University

Prior experience

- Supported a proprietary university in assessing various strategic options including conversion into a NFP and establishing a services OPM business; built economic forecast model and helped identify potential partners
- Helped lead extensive multi-year partnership with the Bill and Melinda Gates Foundation focused on deepening understanding of ROI of student success interventions (advising, development education, emergency financial aid) and digital learning in higher education
- Conducted strategic and operational review of leading higher ed and K-12 ed tech player, with a focus on market and portfolio growth opportunities, organizational capabilities

- Nithya is a former BCG Henderson Institute Fellow on the topic of Future of Work through which she has partnered with Harvard Business School. She has authored recent publications on new talent models, and also recently given a TED Talk.

Illustrative project team

Boston Consulting Group

Nicky Axmann

Illustrative project manager
Boston, MA



Education

B.S., Duke University
MBA, Harvard Business School
MPA/ID, Harvard Kennedy School

Profile summary

- Nicky is a core member of the Public Sector practice based in the Boston office. He has experience across economic development and workforce topics with a range of State and Local governments in the Northeast.

Relevant experience

- Reorganized a US state's COVID-19 pandemic response including creating and operationalizing a refreshed response strategy
- Developed and implemented a workforce development plan for a large US state with goal to roll out \$250M+ in new funding
- Conducted a comprehensive economic assessment of COVID-19 impact on the economy of a 19M+ population US state, including proposals for policy areas to prioritize across prioritized sectors

Prior experience

- Prior to BCG, advised clients in southern and eastern Africa on how to use advanced data analytics more effectively, and in India to evaluate the impact of large-scale social and economic programs.

Dr. Tori Berquist

Illustrative project manager
Boston, MA

Profile summary

- Tori is a Project Leader in the Boston office, having previously worked out of the Melbourne and San Francisco offices. She has deep experience in the Public Sector and Healthcare practice areas.

Relevant project experience

- Worked with a state government department to assess and recommend changes to their operating model following COVID-19
- Developed ten-year health strategy for a government healthcare system
- Scoped strategic opportunities for shared services for a government client



Education

BMSc, Monash University
MD, Monash University
MPP, Harvard Kennedy
School

- Seconded to the strategy and finance department of a large private hospital network to manage budget impacts of new five-year strategy
- Prior experience**
- Before joining BCG, Tori worked as a medical doctor and advised state government on various issues pertaining to health and human services.

Appendix B – Conflict of interest statement

After reviewing the scope of work in this RFP, we do not believe that BCG has a perceived or actual conflict of interest at this time. For all projects, BCG proactively monitors any instance of perceived or actual conflict of interest, and we also mitigate potential conflict of interest situations through close adherence to our company conflict of interest policies. These policies are designed to ensure potential conflicts are quickly identified and effectively managed. Because BCG is a global company that enters into contracts daily, we reserve the right to update this disclosure if selected for award under this RFP.

By serving multiple companies in the same industry and working across tangential industries, BCG has been able to deepen our industry and functional knowledge and increase our ability to take an informed view of the strategic issues facing our clients. Working in an inter-connected world, our services for one client frequently have the potential to impact the interest or decisions of other clients. For example:

- BCG has a robust Higher Education consulting practice and ongoing, confidential client relationships with various public and private educational institutions and supporting commercial companies. BCG has, and will continue to, bid for work with educational institutions and companies in the educational services sector.
- BCG's USG consulting practice offers a full range of technology solutions and services that help U.S. Federal Government, state & local governments realize a bold vision for responding to today's, and tomorrow's most pressing needs and challenges. BCG is working with both national and state & local governments to improve higher education, workforce development, and economic growth. We anticipate that BCG will continue to pursue opportunities to help ensure high-quality educational options for all students.

The team working on this contract has received training on strict procedural and technical protocols to ensure that the information shared by clients is kept appropriately secure and confidential. The project leadership will continue to reinforce these practices and the team will undertake appropriate training and guidance from MACC as requested and/or required. Some of the key principles that BCG teams practice in performing contracted services include the following:

- BCG adheres to strict confidentiality obligations with its clients and ensures that each BCG consultant is trained to abide by these obligations and our internal procedures;
- Each individual client team establishes confidential "firewalls" between itself and any project teams working in any relevant industry and/or practice group (and the rest of the company and all third parties), so that no information is shared with unauthorized individuals or entities;
- BCG will not concurrently serve clients on both sides of a particular matter, and individual BCG employees will not simultaneously serve different clients on the same topic; and
- BCG employs technical security and encryption protocols to ensure all confidential information is safeguarded securely from inadvertent disclosure of any kind.

In support, and in addition to all of the above, as the leader of BCG's team for this project, Rob Souza will work with MACC to evaluate and address any potential perception of conflict of interest, or related issues.