

October 2, 2023

Nate Mackinnon
Executive Director
Massachusetts Association of Community Colleges
591 Springs Road, Building #2,
Bedford, MA 01730

Re: Response to Request for Proposal for Massachusetts Free Community College Planning

Dear Mr. Mackinnon,

Deloitte Consulting LLP (“Deloitte Consulting,” “Deloitte,” or “we”) is pleased to submit this proposal in response to the request of the Massachusetts Association of Community Colleges (“MACC,” “Client,” or “you”) for consulting services to assess and evaluate the feasibility and strategies for implementing a free community college program in the Commonwealth of Massachusetts. We are grateful for the opportunity to present our capabilities and approach to complete this potentially transformative work in the Commonwealth. We believe a combination of factors support our response and uniquely position Deloitte to best support Massachusetts in this critical endeavor that has advanced thus far with the support of Governor Maura Healey, the legislature, community college leaders, and so many other stakeholders. Those factors include the following:

- **A deep understanding of Higher Education.** Deloitte brings over 100 years of service to higher education institutions having helped over 500 universities, colleges, and systems transform every aspect of their business operations. As demonstrated by our long track record of successful projects and implementations, we understand the diverse needs of institutions and bring the capabilities needed to both develop and implement strategic transformations within higher education institutions and systems. In addition, the research we conduct at our in-house Center for Higher Education Excellence allows us to identify future trends and changes that will impact the higher education landscape.
- **Analytics and financial assessment are at the core of our business.** We have deep experience in analytics to inform strategy and estimate the potential impacts of new policies and operating structures within higher education and across nearly every industry. Our proposed team brings decades of experience with enrollment and financial modeling to support analysis that will be realistic and actionable from a policy and implementation perspective. Our analytical approach generates insights that allow our clients to make informed decisions that go beyond use of publicly available data and general assumptions. Working closely with our clients, we apply our methods to create scenario-based plans that work in the “real world,” along with change management support. Our collaborative approach ensures that our final recommendations are not a “grand reveal” created inside a “black box”.
- **We bring proven methods and tools to support community colleges** — from initial analysis through implementation. We deeply respect and value the unique role of community colleges in the broader higher education ecosystem and we have served many community college systems throughout the country on strategic initiatives. We have worked to accelerate the impact of community colleges on their states as engines of social mobility and workforce development, especially for first generation students and Students of Color. We know that community colleges have a unique perspective on their communities; thus, we will seek your stakeholder input and engagement in the formation of our deliverables, allowing your organization to amplify the voice of many as you explore a new model of funding for community colleges in Massachusetts.

- **We are national leaders at the intersection of workforce development and higher education.** We have worked with numerous states including Massachusetts, Pennsylvania, Virginia, Ohio, Georgia, North Carolina, and others to identify critical needs for their states' job seekers and employers, and we have worked across institutions of higher education, private organizations, government agencies, non-profits, and policy makers to develop innovative solutions to meet workforce demands in critical industries for each respective state. We leverage proprietary databases in addition to publicly available data to provide insights on workforce and skill gaps and opportunities, and we facilitate engaging cross-functional conversations to collaboratively arrive at impactful solutions.
- **Long-standing partnership with Massachusetts:** We have worked with the Commonwealth of Massachusetts and its educational institutions for several decades and have hundreds of practitioners who live and work in the Commonwealth and completed their education at Massachusetts' institutions. We are deeply committed to bringing top-quality services and solutions to Massachusetts. Our recent projects include the Framework for Support Services for Student Success and the Strategic Plan for Racial Equity, which were both projects completed in collaboration with the Department of Higher Education (DHE) and included considerable engagement with all 15 of your community colleges. Our team has cultivated meaningful relationships at the state and community college campus level. When we say we know your institutions – we mean it!

Our team is very excited about the opportunity to serve MACC and continue to support the Commonwealth of Massachusetts on this important effort. Thank you in advance for your review and consideration. Should you have questions, please feel free to contact me directly at 215-779-4467 or via email at pfritz@deloitte.com.

Sincerely,



Pete Fritz

Principal
Deloitte Consulting LLC

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Our Understanding

The Massachusetts Community College system consists of 15 independent colleges across the state, founded between 1958 to 1975. The community colleges provide their students with a high-quality, affordable education, including direct career preparation into high demand occupational industries, and transfer pathways to 4-year institutions within the state. They are dispersed throughout the state, serving as leaders within their communities and providing opportunities to connect and give back through intellectual, cultural, and economic development. Community colleges also give back to their local communities by offering pre-college programs to introduce high school students to higher education, as well as provide non-degree programs to local community members who are looking to enrich themselves in different capacities and improve or upgrade their skills for a changing job market. We are aware of the expanding role and investment Massachusetts has made in its Early College programs, which the community colleges have meaningfully supported.

Community colleges in Massachusetts are a cornerstone to the larger higher education ecosystem within the state. The colleges are providing an education to 41 percent of the students in the Massachusetts higher education system (FY21) with an enrollment of more than 110,000 students, which consists of both degree and non-degree seeking students. Community colleges are often an access point to higher education for low-income and historically underserved students. In

Massachusetts, 28 percent of Pell Grant recipients attend community colleges, with over \$90 million offered in Pell grant aid. However, even with this level of aid available, affordability is a barrier to access and persistence for many students.

Under Governor Maura Healy's administration, the Commonwealth is dedicated to making higher education accessible to all residents of Massachusetts. The initial step of this rolled out in August 2023 with MassReconnect, a program that offers free community college to residents over the age of 25. Now, the Massachusetts Association of Community Colleges (MACC) is exploring the feasibility and strategies for a plan to provide free community college to all residents of Massachusetts regardless of age. The benefits of such a program are widespread, including statewide economic development as well-educated and trained residents enter the workforce as well as benefits to the individuals who will see considerable increases in their own lifetime earnings without debilitating student loan debt to go along with it. The return on investment for states to invest in community college education is well established as increased tax revenues, decreased spend on social services, vibrant communities and economies flourish among well-educated populations.

With the goal of free community college across the state in mind, MACC is looking for a consultant who can assist with evaluating and developing strategies for policy, programming, and implementation. This analysis will demonstrate an understanding of the current higher education landscape and trends pertinent to the implementation of free community college across the 15 institutions in Massachusetts. The project will

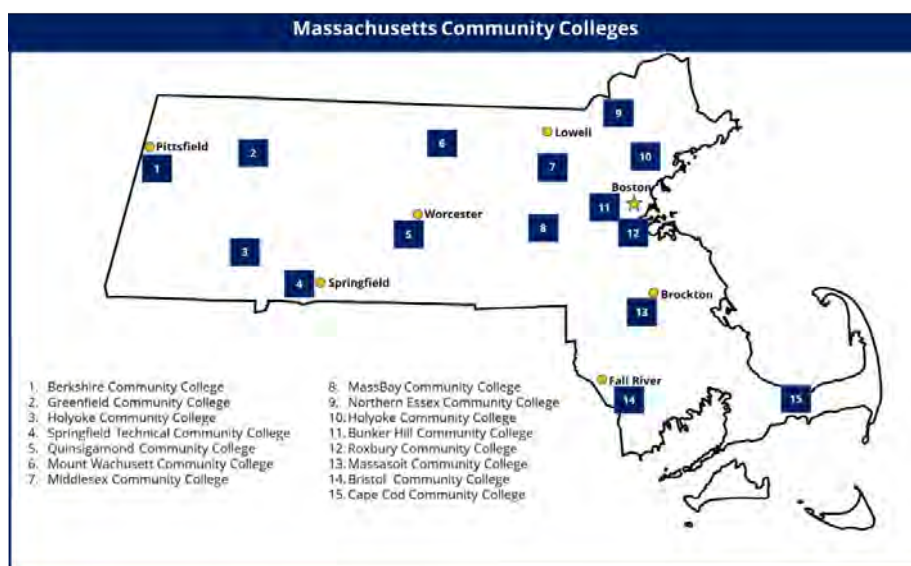


Figure 1: Massachusetts Community Colleges

produce detailed data analysis of comparable programs nationwide and indicate the potential impact on access to higher education, workforce development, and economic growth. There will be logistical and administrative demands associated with cost, policy, faculty/ staff, and physical resources needs that will be evaluated and assessed. The project will result in a report for the Commonwealth to consider as this initiative takes off with an array of impacts and implications of the policy on the higher education ecosystem, workforce, and economy of Massachusetts.

About Deloitte and Our Differentiators

Deloitte's Higher Education Practice

Deloitte's unparalleled experience in higher education, as well as decades-long collaboration with the Commonwealth makes us the premier partner for MACC in this endeavor. We are uniquely positioned as industry leaders in data and analytics in the Higher Education sector and have worked with state systems and specifically community college systems across the country. While financial modeling has always been a strength at Deloitte, we also take a holistic perspective on the Higher Education sector and have considerable background in student experience and lifecycle management, digital and technology transformation and organization, talent, and leadership. Collectively these areas of experience will come to bear on the proposed project. These competencies have been refined through delivering over 1,000 projects in the Higher Education sector. Our experience collaborating with colleges and universities, as well as national not-for-profits and large private foundations, on financial forecasting and strategic planning is considerable with prime examples presented below.

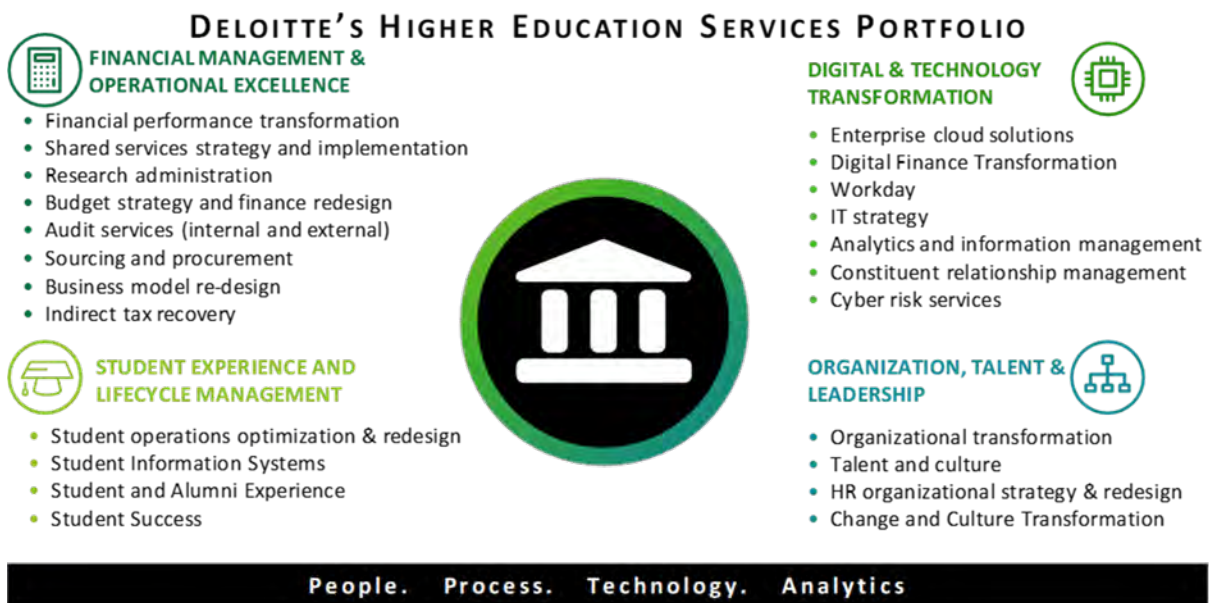


Figure 2: Deloitte's Higher Education Practice

Our Commitment to Higher Education and Community Colleges

Higher Education has been a priority sector for Deloitte since it began supporting colleges and universities in 1913. Since then, Deloitte's Higher Education Practice has cultivated strong relationships with a diverse array of institutions, including state systems of higher education, public and private colleges, community colleges, and all Carnegie classifications of research institutions. We serve more than 500 higher education institutions, including many two-year institutions and community/technical college systems across the US.



Figure 3: Examples of Community Colleges/ Systems & Organizations Sponsoring Community Colleges that Deloitte has Supported

Deloitte understands the culture of higher education and works with each individual client to bring our integrated capabilities to life, turning insights into impact that matters to students, faculty, and administration today – and tomorrow. Deloitte has hundreds of experienced, dedicated professionals with deep industry and functional experience serving higher education clients. Our professionals have supported our higher education clients in critical endeavors, including but not limited to strategic planning, racial equity initiatives, student success, student experience redesign, career preparedness, operational and financial transformation and strategies related to state workforce development.

To help colleges and universities contend with strategic and operational challenges, Deloitte founded the Center for Higher Education Excellence, which focuses on groundbreaking research to provide guidance to institutions navigating these issues and reimagining their futures. We understand that a consensus-driven approach is crucial to the success of higher education efforts, so we aim to establish collaborative relationships with our clients and engage all relevant stakeholders during every project. We understand the importance of engaging and working inclusively with the Executive Office of Education (EOE), DHE, Board of Higher Education (BHE), College Presidents, faculty, staff, and students during the strategic visioning and planning process. Additionally, through the Center, we engage the Higher Education community through forums and immersive lab sessions to increase collaboration and knowledge sharing in teaching, learning, and research.

Our Leadership in Data and Analytics

For decades, Deloitte has helped higher education institutions solve the industry’s most complex challenges by leveraging data-informed strategies and analytics. Deriving value from data is critical for institutions and systems seeking to enhance their enrollment, student success, academic, and research outcomes. Deloitte has built an entire practice dedicated to the management and distillation of data to help clients – both in higher education and in other sectors – unlock this value. We are continuously recognized as a market leader in data management and analytics and employ more than 3,200 professionals with this experience.

Deloitte’s analytical capabilities are frequently recognized by experts, including many years as Gartner’s top-ranked Data and Analytics Service Provider, a leader in Gartner’s Enterprise Insights Service Provider list, and IDC’s leader in Business Analytics Consulting. Our core analytics capabilities are further augmented with proprietary data assets, tools, and accelerators which provide new and valuable insights to our clients including our Candidate360™ student lifecycle analytics solution and our proprietary PeoplePrism™ data set.

Our data and analytics leaders are also focused on the curation and development of data sources related to higher education and other sectors —a capability that will be significant in our work with the System. As an example, Deloitte launched DataUSA in April 2016 through a partnership amongst Deloitte, MIT Media Labs, and Datawheel. Data USA is the most comprehensive visualization engine of US public data. Located in a central database, free to access, and easy to navigate, the solution allows institutions to quickly analyze many data points from workforce demographics to industry-specific compensation and job demand. The high-powered tool enables organizations to quickly develop marketplace insights that would previously have taken significant person power to compile, normalize, and compute the data – ultimately leading to faster business decisions based on reliable information. Beyond this public example, we have extensive experience curating workforce and higher education data through both publicly available sources (as with DataUSA) as well as through proprietary datasets held within the firm and accessed through partnerships.



Figure 4: Gartner’s Magic Quadrant for Data and Analytics Service Providers

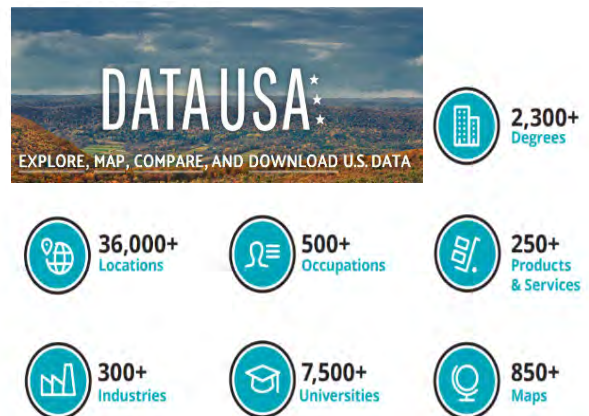


Figure 5: Data USA Overview

Our Experience with the Commonwealth

Additionally, for more than 40 years, Deloitte has served the Commonwealth across multiple agencies and educational institutions, including the Executive Office of Education, DHE, University of Massachusetts Amherst, Colleges of the Fenway, numerous private institutions including Harvard, MIT, Tufts, and Northeastern, to name a few examples. Our support is anchored by our office in downtown Boston. As highlighted in the diagram, Deloitte has consistently been recognized as a leading employer in Massachusetts.

Deloitte has 2,540 employees educated in Massachusetts colleges and universities who not only work every day to assist public and private employers in the region, but they are also actively engaged in their

communities. As such, we have a firsthand understanding of the Commonwealth's needs and a track record of success in our partnership with them. Thus we know Massachusetts: its higher education system, its state government, its corporate ecosystem and the residents those systems serve.

Most recently, Deloitte partnered with the DHE, all 15 community colleges and 9 state universities, to develop and provide implementation planning support for the Framework for Support Services for Student Success. Through these activities, Deloitte has gained an intimate understanding of Massachusetts' public higher education ecosystem, specifically with the community colleges, where members of the Deloitte team have spent hundreds of hours across the institutions in 2023 alone understanding needs of students and what the colleges need to successfully support their students. Should MACC choose Deloitte as their partner in this endeavor, the project team would continue to leverage those relationships and knowledge developed to accelerate and inform the process and resulting recommendations associated with the current effort.

In addition, our Deloitte team collaborated with the DHE and other key stakeholders to develop the Commonwealth's first ever statewide Strategic Plan for Racial Equity. As part of that effort, we conducted an environmental scan of the Massachusetts public higher education system and the Commonwealth's economy and supported the New Undergraduate Experience committee (NUE) with the refinement of their recommendations. While racial equity may not be the central driver of the effort for free community college in Massachusetts, we know that Massachusetts community colleges serve the most diverse group of students in the state and through our prior work with the Department of Higher Education and 15 community colleges, we know that affordability and access for Students of Color in the Commonwealth is a critical priority of the system, and free community college will likely benefit Students of Color disproportionately to other groups.

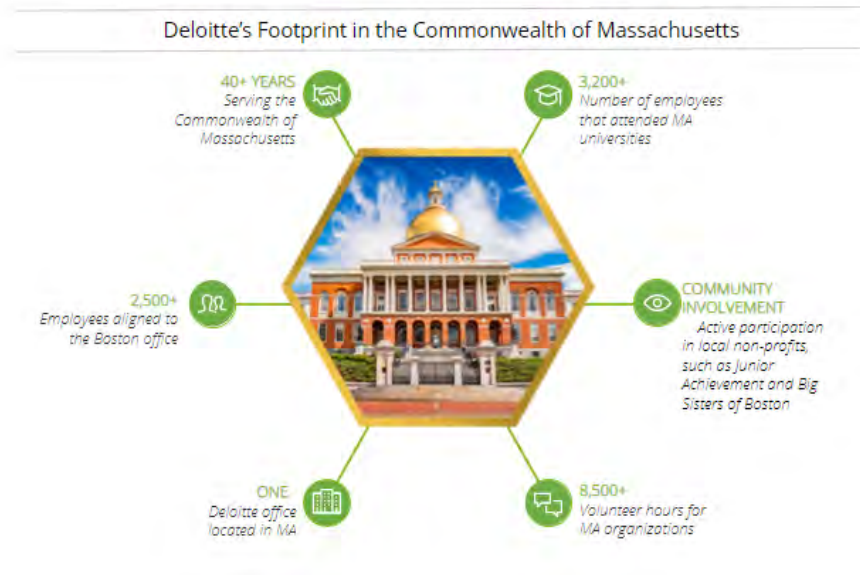


Figure 6: Deloitte's Footprint in the Commonwealth of Massachusetts

Our Approach

Based on our experience conducting engagements with similar scope and complexity, Deloitte proposes a five-phased approach beginning in mid-to-late October 2023 and concluding in late June 2024 (approximately 37 weeks of effort). The five phases of this engagement are briefly outlined below:

- **Phase 1: Project Mobilization** (2 weeks) focuses on working with MACC leadership to establish project governance and finalize the project work plan and timeline including identification of early stakeholder engagement and delivery of a data request as well as drafting of project communications to any stakeholders that will be engaged in Phase 2.
- **Phase 2: Discovery, Research and Financial Analysis** (~ 7 weeks) will result in the development of a baseline enrollment and financial model to help MACC anticipate the potential impact of implementing and sustaining free community college in Massachusetts with a draft report that includes impacts on the larger Massachusetts higher education ecosystem, workforce development and economic growth. These preliminary findings will be matured and developed through extensive stakeholder engagement and refinement with MACC leadership in Phase 3.
- **Phase 3: Review and Assessment of Findings** (~ 5 weeks) occurs just before and after the New Year, which provides an opportunity for MACC leadership to review the drafted report, provide ample feedback and for the project leadership at both Deloitte and MACC to carefully consider next steps including any refinement to the stakeholder engagement plan that will be a central focus of Phase 4. During this time, Deloitte will conduct a review workshop with MACC leaders to initiate the review process.
- **Phase 4: Logistics and Implementation Planning** (~ 13 weeks) will occur throughout the late winter and spring seasons of 2024 and will be focused on building out the baseline enrollment and financial model into a series of scenarios that can estimate the potential impact of enrollment shifts due to offering free community college in Massachusetts. These scenarios will be informed by conversations with other states that have already implemented similar programs, as well as through socialization of the baseline model and identification of potential impacts through extensive stakeholder engagement within the Massachusetts Higher Education system. The result will be a mature and final report that includes a range of recommendations on the design and execution of the initiative focused on costing and funding, policy and regulatory changes and outcomes and impacts.
- **Phase 5: Socialization and Final Review** (~ 10 weeks) will take us from late April through June as we socialize the final report with key stakeholders in the Governor's office, state legislature, state agencies including the Executive Office of Education and Department of Higher Education as well as key campus stakeholders for a variety of segments including the community colleges and state universities.

As shown above, Deloitte's approach will begin with an intensive, data-driven and stakeholder-informed assessment followed by an iterative and inclusive process to mature the draft report delivered in December into a mature and final report in April. Massachusetts will benefit from Deloitte's expansive experience in delivering strategic finance and enrollment projects through the Higher Education sectors and from our national perspective on working with community college systems and furthermore MACC will benefit from the insights of other states that have already begun or adopted free community college in their states.

Methodology

Phase 1: Project Mobilization (2 weeks)

The objective of Phase 1 is to set the project up for success by completing several project management activities that build a foundation and structure for the work to be completed over the course of the engagement. We will work closely with MACC leadership to confirm objectives for the engagement and develop an understanding of your vision for success. These activities will include but are not limited to:

Establish Project Governance

Deloitte understands the role that governance groups can play and the importance of establishing governance early to guide the project. During project mobilization, Deloitte will support MACC leaders in establishing a Steering Committee to guide the project and help Deloitte execute the workplan. The Steering Committee will also vet all work products and deliverables before final submission. Deloitte will meet regularly with MACC Steering Committee (cadence to be determined, but bi-weekly meetings with a Steering Committee is common) to share findings, keep MACC apprised of progress, and resolve any project risks. The leader of the Steering Committee is considered the Executive Sponsor who serves as the Chair of the Steering Committee. In addition to a Steering Committee, it is important that a point person or project manager be assigned from MACC leadership to act as our primary point of contact on the client side. This person will help to set up meetings and identify availability of MACC leaders and stakeholders, as well as collect and transfer data to Deloitte, and triage questions to the right people at MACC. This point person is likely to communicate with the Deloitte team often and will meet with the Deloitte team and the Executive Sponsor at least weekly to support the progress of the project.

Receive Required Data and Documentation

Early in Phase 1, Deloitte will submit a detailed data request to MACC. Data and information collected through this request will primarily serve as the source of truth for our analysis; however, data will not be analyzed in a vacuum as we will conduct numerous interviews with key constituents to provide context behind the data and work with campus Vice Presidents in Enrollment and Finance to understand how campus operations are likely to be impacted by a free community college policy. The data and reports requested are expected to be “off the shelf” so as not to overburden staff. In cases where data are not available, we will work with staff to develop workarounds or alternative solutions. To accelerate the project timeline and ease the burden on the campuses, we hope that much of the data needed for this project can be collected centrally through MACC, DHE (as has been our experience working with other public higher education systems), or IPEDS; however, there may be certain data items that are better handled locally by each campus (e.g., enrollment projections, financial dashboards, etc.). As such, we will review what is able to be collected with MACC and then develop a campus data request that will be sent to each campus individually to fill any outstanding data needs.

Conduct MACC leadership Interviews

Although we will hold a MACC Steering Committee Kick-off Meeting, we also hope to spend 45 minutes to an hour with key members of the MACC leadership team—we expect to hold six to ten interviews during the project mobilization phase. These interviews allow us to probe and dig deep on each leadership member’s vision for project success, understand the ways that MACC interacts with the constituent campuses, and solicit initial ideas for further exploration to improve the outcome of the project and the resulting models and

recommendations. These interviews allow MACC leaders to help shape our project plan and identify areas of focus and the manners in which MACC has worked to address challenges on the campuses in the past.

Confirm the Project Workplan and Schedule Status Report Meetings

Deloitte will develop a detailed workplan to accomplish the objectives detailed within MACC’s Request for Proposal. To ensure that the project workplan is adhered to, Deloitte will schedule status report meetings to occur weekly with the Executive Sponsor and MACC Project Manager. During these meetings, Deloitte will review the workplan, surface any potential risks, and seek to gain consensus on key decisions to move the project forward. In addition to status reports, the adjacent graphic illustrates the components of Deloitte’s project management methodology that we use to accelerate project delivery. These tools will be used to manage the overall timeline, identify and resolve project risks, coordinate and integrate activities, identify and adjust resource allocations according to the workplan, communicate and confirm ability to meet milestones, and measure progress. These project management activities place transparency and communication at the forefront of our communications with you. We appreciate the gravity of this project and need to meet the deadlines as laid out in the RFP and will leverage our project management tools to meet those dates.



Figure 7: Keys to Project Management

Hold Steering Committee Kick-off Meeting

At the conclusion of the first two weeks of the project, the Deloitte team will hold a project kick-off meeting designed to formally confirm the scope, project objectives, methods of engaging with the MACC, system and campus stakeholders, and the approach to the analysis. This kick-off meeting will be the first in a series of one hour to one-and-a-half hour meetings with the MACC Steering Committee that will occur regularly (e.g., bi-weekly). This kick-off meeting will help inform our path forward as we engage with the campuses and will include discussions of expected outcomes such as:

- Projected impacts of implementing free community college on access to higher education, workforce development and economic growth
- Financial models to create and sustain a free community college program in Massachusetts
- Expectations for administrative and logistical requirements for successful implementation
- Recommendations on the design and execution of a free community college initiative to be delivered in the final report that focuses on cost, associated polity and regulatory changes, and outcomes/impacts

Share Communications with the Campuses and System Stakeholders

Once the project scope, priorities, and methodology have been vetted and confirmed by MACC’s Steering Committee, Deloitte will draft a communication to be share with campus leaders and key system stakeholders that might be engaged throughout the process. The materials shared in these communications may include but are not limited to the following:

- Project overview, including goals, priorities, and broad phases of the project

- Campus data requests to cover data needs not captured through centralized MACC or DHE data
- Proposed campus interview request list which will be vetted by the MACC Steering Committee, but we propose interviewing the campus Presidents and Chief Financial Officers in Phase 2, and then conducting a focus group with each community college in Phase 4 that would include the Chief Academic Officer, Chief Human Resources Officer, Vice President of Enrollment Management, and Vice President of Student Affairs. We would also propose interviewing Commissioner Noe Ortega at the DHE and a few additional key leaders at the DHE to coordinate efforts with that critical agency, as well as some relevant legislative leaders.

Once data has been received and we have permission to connect with campus and system leadership, we will be ready to commence Phase 2 of the project.

PHASE 1 WORK PRODUCTS & DELIVERABLES

- Finalized Project Plan (WP)
- Communications draft for campus and key stakeholder distribution (WP)

Phase 2: Discovery, Research & Financial Analysis (~ 7 weeks)

Phase 2 will be the most intensive period of effort throughout the project as we collectively sprint toward the December 15th deadline for a draft report of findings. Included within that draft report will be a baseline enrollment and financial model that is parsed into various scenarios to help MACC anticipate the potential impact of implementing and sustaining free community college in Massachusetts with potential impacts on the larger Massachusetts higher education ecosystem, workforce development and economic growth. Included in this draft will be a framework for decision making driven by guiding principles that will be utilized in forming the scenario-based model and subsequent choices in program and policy development related to the initiative. By agreeing to a principled framework early in the process, this will help to guide and shape the work for the remainder of the phases. The development of this draft report will require the following key activities:

1. **Contextual Analysis:** A broad perspective on the demographic and historical trends impacting Massachusetts Community Colleges obtained through data analysis and leadership interviews at the state, MACC, and campus level; inclusive of enrollment and financial trends across the MACC institutions, workforce trends within the state, and a comparative assessment of impacts of free community college programs in states that have previously implemented a similar initiative.
2. **Enrollment Forecasting:** A deep dive into the scenario-based drivers that could change the student body size and composition after implementing a free community college program using public and proprietary data that will enable efficient and actionably accurate projections to guide financial modeling.
3. **Financial Analysis:** A scenario-based model that will use the forecasted enrollment and then estimate the financial impact. The scenario model will be driven by a breadth of adjustable input variables and enable the user to evaluate future-state enrollment scenarios and their impact on financial sustainability. The model will connect the recruitment and enrollment lifecycle, student progress and retention, faculty and staff levels, and the operating budget to estimate the investment required to achieve enrollment goals and the cost of supporting student success. Associated costs will be estimated and presented in a 5-year projection which will appraise the total cost of education and delivery, broken down into high-level expense categories, as well as the state investment needed to sustain the program.

These three key activities are described in further detail below.

Contextual Analysis

Inside Massachusetts

Context both within and outside of Massachusetts will be critical to understand as our enrollment and financial models are built and evolve. To gather that context early, we propose that a series of “internal” interviews are held with MACC’s leadership team, state and campus leadership. We want to begin with the end in mind and we expect that the success of the project will largely hinge on whether our analysis has buy-in at the state (e.g., DHE) as well as at the campus-level. Early engagement with key stakeholders is an important strategy to cultivating buy-in. Therefore, we propose having a small group interview with each campus separately to include the President, CFO and VP of Enrollment Management or Admissions. We hope to gain a perspective on their initial vision of success as well as their preliminary concerns. We would get their feedback on the key elements of the model we intend to develop and discuss their thoughts on risks and potential mitigation strategies early on in the process, while also hearing about the unique factors to consider as their campus envisions a future with free community college.

Nationwide Context

Massachusetts is exploring the possibility of free community college at an ideal time when other states such as Oregon, Nevada, New Mexico, Michigan, Tennessee, Maryland, Delaware, Connecticut and Rhode Island have all established free community college programs with few but various eligibility requirements. During Phase 2, the Deloitte team will research these states’ policies, and seek to quantify the impact of those policies on the enrollment and overall budgets associated with their community college systems. Key data we can obtain from publicly available sources will include:

- Community College enrollment pre- and post-policy change
- High-level financial analyses pre- and post-policy change
- Retention and graduation rates pre- and post-policy change (pending date of the policy given the lag in data for these metrics)
- Staffing levels of full- and part-time faculty, full- and part-time staff, and administrators pre- and post-policy change

These data will be considered as the Massachusetts model is matured and will guide our way toward a limited set of states that may be highly relevant to the Massachusetts initiative, warranting a more intimate conversation with those state higher education leaders to uncover the unanticipated impacts and lessons learned from those states. It is important to note that many of these new policies are relatively new and data on the impact of these policies may be limited; we will work with MACC project leadership to assess and address any differences encountered between the ideal data inputs and the true state of the data available.

Enrollment Forecasting

The most critical variable to the model that a free community college program hopes to influence is enrollment. The expectation is that new students will come into the community college system and additional existing students will be retained with the removal of tuition pressures. We cannot begin to estimate the financial impact of offering free community college until we model the dynamics and pressures that may result on the size and unique composition of the student body itself. We also need to acknowledge that some of the additional community college students may be students that would have initially engaged in your public or private four-year institutions as the value proposition of starting at a community college becomes amplified with a zero-cost policy.

Deloitte not only understands that enrollment forecasts (for traditional-aged and non-traditional adult learners) are complex projections with competing influences, but also that the students in Massachusetts are unique compared to other states offering free community college programs. Massachusetts has already considerably expanded MassGrant Plus, which has been a last-dollar program to meet unmet financial need for tuition and fees after the expected family contribution (EFC) and all other financial aid is applied. We also know that MassReconnect is being implemented in the current academic year, and initial findings from that initiative may inform our initial models. The reality is that just making something free doesn't mean everyone can or will participate. Our work with your Framework for Support Services for Student Success identified cost of living, cost of daycare and other basic needs concerns as a driver to stopping out or not accessing public higher education in Massachusetts (a trend that is aligned with our clients nation-wide).

Deloitte recognizes that MACC seeks a calibrated 'right-sized' analysis approach, that provides both accurate and precise forecasts without endless iteration.

To complete this activity, Deloitte proposes a series of multi-perspective analyses to triangulate on a forecast leveraging unique datasets to accelerate the assessment and decrease the time from data to insights. Deloitte proposes that to assess enrollment forecasting accurately we complete the following analyses to answer the following questions:

- **Peer Institution / State Impact Analysis**
 - How have MA and peer community college enrollment changed as a result of past tuition changes?
 - How has enrollment among peer community colleges in other states changed as a result of free tuition?
 - What underlying circumstances may be unique in those areas and therefore accelerate or decelerate enrollment changes within MACC?
- **Historical Trend Analysis**
 - How have MACC institutions trended from an enrollment perspective?
 - What are the underlying circumstances that have influenced historical MACC enrollment trends?
- **Demographic Analysis**
 - Are there demographic or socio-economic changes that would influence enrollment, regardless of free tuition?
 - What population trends and in what locales might influence enrollment at specific MACC institutions?
- **Workforce Demand Analysis (Supported with Deloitte's Human Capital Data Lake Data)**
 - Due to the need for upskilling and recertification, how does MA's workforce trends likely impact the future need for community college degrees and certificates?
 - What are the likely future changes in MA's labor demand and available skillsets?
- **Individual Student Analysis (Supported with Deloitte's PeoplePrism™ Data)**
 - What are the current MACC student profiles?
 - What underlying motivations or environmental factors – beyond geographic or financial – of MACC students might influence student success / retention / persistence?
 - What underlying factors beyond geography and finances may influence student decisions/behavior?
 - What is the potential magnitude of change among characteristics within the student profiles if free community college is introduced?

The combination of these analyses will allow MACC to understand not only likely patterns that result from a policy change, but also increase the understanding of their unique context. More specifically, how Massachusetts students might react given the statewide demographic trends, the unique Massachusetts institutions of higher education, and the Massachusetts-specific workforce opportunities and labor demands.

While our approach to this engagement includes the use of publicly available data and modeling the demographic characteristics of existing community college students, as well as assessing the trends in other states that have adopted free community college, we believe that an additional level of granularity in

enrollment modeling is needed to adequately anticipate the enrollment projections needed for this initiative. We aim to provide you with far more accurate scenarios and a far deeper understanding of the potential affected students, based on assumptions we will collaboratively discuss, visibility into your existing student populations that we hope to expand, and modeling of new student populations that we can profile in your geographic areas that are likely to engage with your community colleges in a future state where the cost is zero.

Deloitte’s strength in our analytical capabilities place us in a unique category among our competitors in the marketplace and our proprietary databases give us access to a granularity of data that is a true differentiator. Extending beyond simply Census and American Community Survey (ACS) data, Deloitte’s PeoplePrism™ (see Figure 8) and Human Capital Data Lake can extend insights into individual adults and households, and pair with workforce demand insights, respectively (e.g., household trends, affinity, and financial information).

Deloitte’s proprietary PeoplePrism™ dataset combines a diverse set of data sources to provide more than 1,700 variables on more than 230 million U.S. adults and 130 million U.S. households. Updated monthly and offering seven years of longitudinal information, PeoplePrism™ offers a comprehensive 360-degree view of each adult and household, unlocking insights that can be used to best fit MACC’s goals and strategic commitments. Deloitte has used our PeoplePrism™ dataset for over 15 years across higher education, state governments, and within various industries to enhance our client’s data and forecasting objectives.

Deloitte Uses PeoplePrism Data to Optimize State SNAP Enrollment

Issue: A state’s Cabinet for Health and Family Services (CHFS), which administers the SNAP program for low-income households, looked for a more targeted and effective strategy to increase enrollment.

Solution: CHFS engaged Deloitte to provide detailed analyses and insight into populations most vulnerable to insufficient food access and potentially eligible but not receiving SNAP benefits. Deloitte **identified an additional 847,000 adults making below 200% FPL not currently receiving SNAP benefits.**

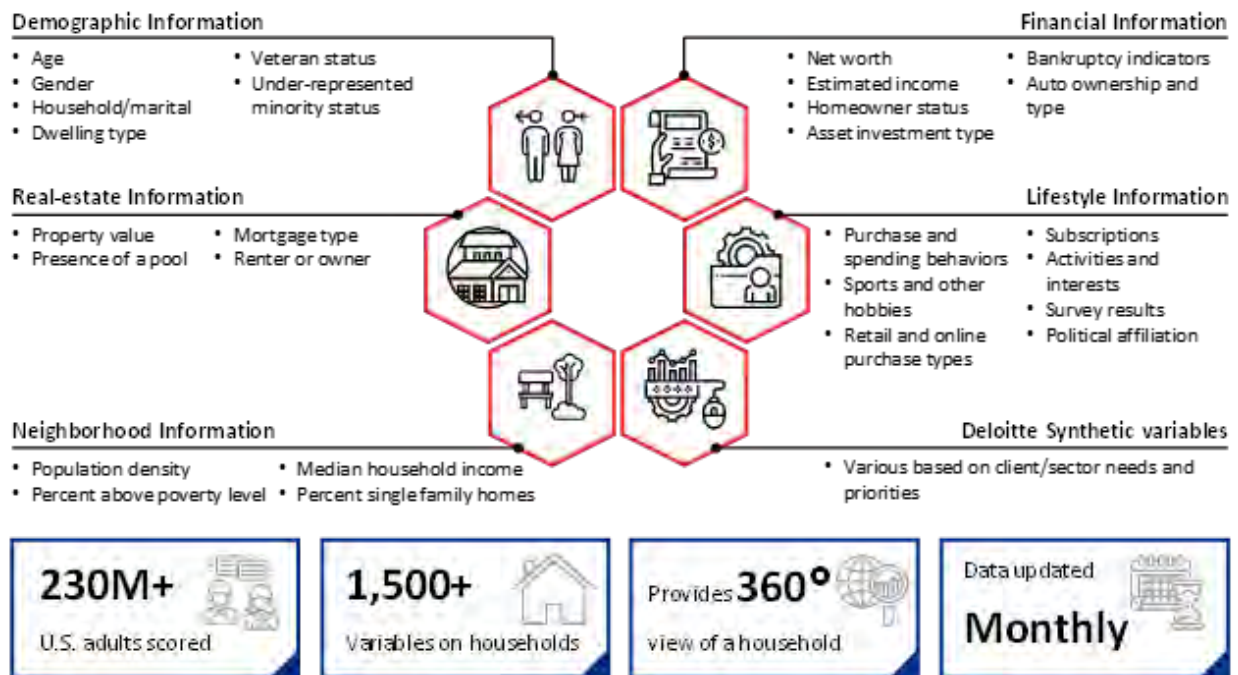


Figure 8: Overview of Deloitte’s PeoplePrism™ data for Household and Individual Insights

Understanding the labor market that community college graduates will enter – or that community colleges will compete with for student enrollment – is critical when also assessing potential institutional impact and student behaviors of a free community college tuition policy. Deloitte’s Human Capital Data Lake would serve as a tool to understand historical and likely workforce trends that would drive students to MACC’s degree programs.

Through the Data Lake, we can analyze the labor market to identify in-demand skills, occupations, and industries. This platform provides objective workforce insights, scraping real-time, curated, global labor market intelligence data from over 30,000 unique sources. See below for additional details on the Human Capital Data Lake.

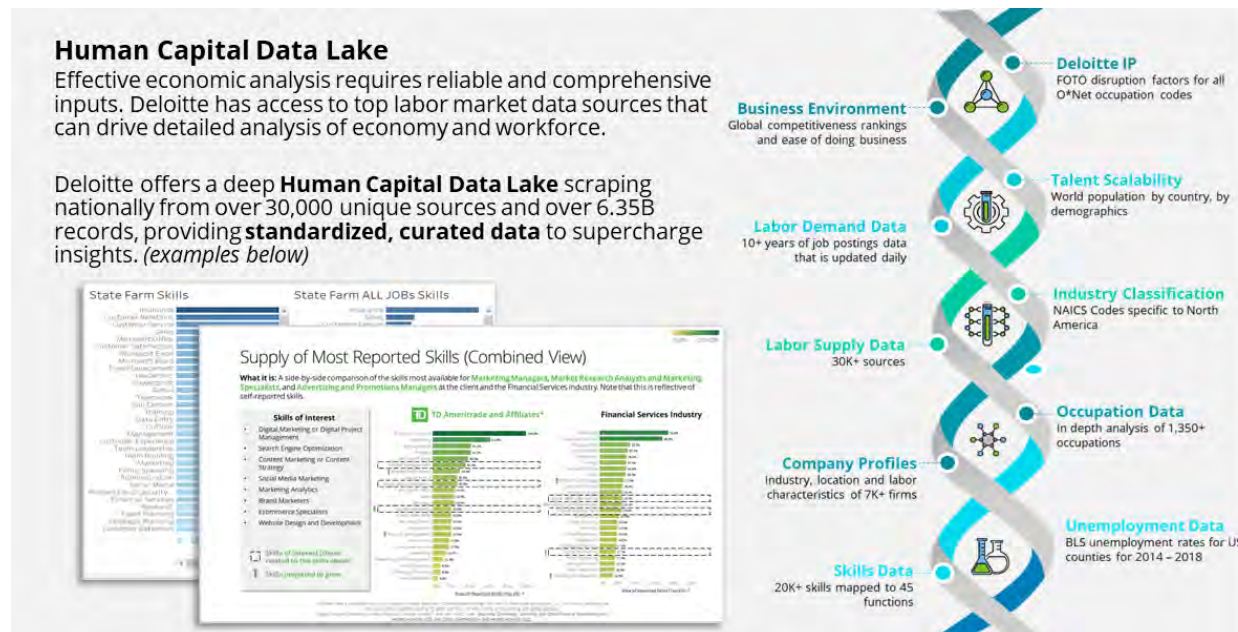


Figure 9: Deloitte's Human Capital Data Lake

These detailed datasets will support the depth of analysis necessary for more precise forecasting without creating endless churn or prolonging the project timeline. By combining publicly available IPEDS, MACC, and peer institution data with our PeoplePrism™ and Human Capital Data Lake, our team will provide enrollment insights for the community colleges across Massachusetts at the individual institution level and in aggregate.

	Census Data	PeoplePrism™	Human Capital Data Lake
Availability	- Publicly Available	- Unique to Deloitte	- Unique to Deloitte
Available Data	- Census Tract - Zip Code	- Individual Adult - Household - Census Tract - Zip Code	- Occupational Data - Compensation Data - Employment Skills
Benefits	Can potentially fill in high-level data gaps for students not in the PeoplePrism™ data	More precise and accurate than Census data, can aggregate individuals and households to provide comparable summary at zip code and Census tract,	Provides enhanced insights into outcome and workforce demand to align budget decisions and degree programs

Figure 10: Benefits of Deloitte's Data vs. a Census Data-Only Approach

With our data, we can also collaborate with MACC to prioritize and to support demographic trend forecasting to support MACC's equity and access objectives and understand state-wide opportunities or headwinds that may occur independently of a policy change. Examples of demographic trend forecasting include, but are not limited to, the following categories: total residents, underrepresented minorities, veterans, first generation college

students, residents with some college, demographic trends by occupation and risk of unemployment, and demographic trends by estimated household income.

Each of the above analyses, and the underlying questions that the analysis aims to answer, results in a list of documented assumptions and the anticipated impact on enrollment influences – such as enrollment headcount and student success. During the analysis, Deloitte works collaboratively with a diverse set of MACC stakeholders to assign and calibrate an anticipated directional impact and magnitude of impact to the assumption. As seen in the image below, Deloitte works hand-in-hand to document and input the assumptions and the anticipated impact into a “What-if Calculator” Enrollment Scenario Planning Tool, which combines data and assumptions, to estimate the impact on future enrollment projections. The What-if Calculator tool allows the team to test multiple scenarios, further calibrating the final, consensus projection and confidence intervals based on the likelihood that a scenario may occur. The flexibility to test multiple scenarios also helps de-risk any ultimate policy decision by testing outlier scenarios and other ‘worst cases’ that may be unlikely but important to understand and mitigate risk.

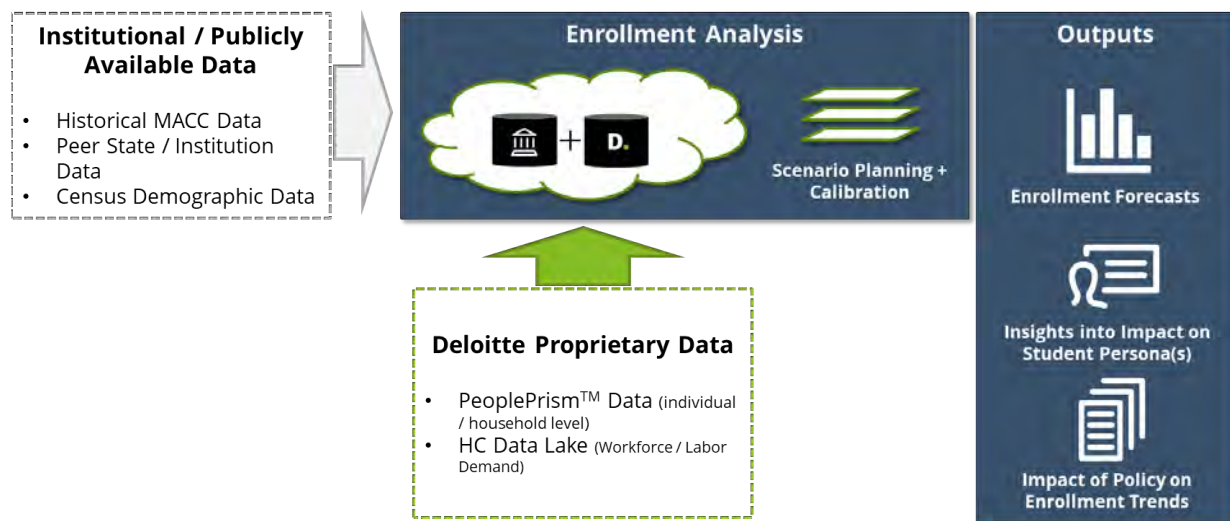


Figure 11: Approach for Deloitte’s Proposed Enrollment Forecasting Modeling

To support student success, Deloitte leverages our PeoplePrism™ data, which has additional individual and household level data, as well as personal profile to aid the understanding of who MACC students are, how they are likely to change, and the potential underlying reasons that could influence students. Using current MACC student data, Deloitte matches each student to a PeoplePrism™ record, making over 1,700 data variables available for that student. The data – for example – help the MACC team understand occupation, income range, and other key variables that enhances

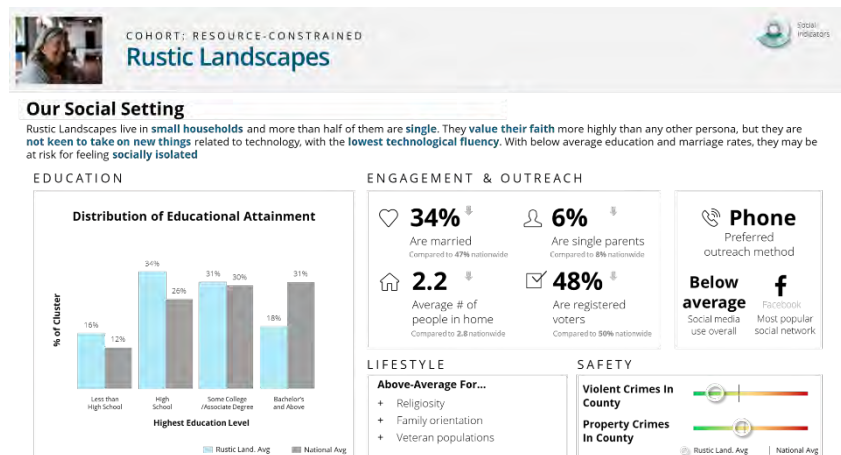


Figure 12: Example Student Data Profile

the understanding behind how many students seek degrees to upskill or change careers, what are potential barriers to returning to community college, or other likely characteristics that support or challenge student success.

Each individual also has a PeoplePrism™ profile, which allows us to look further into the likely student environment and meet Massachusetts community college students where they are. For example, the PeoplePrism™ profile contains insights into the likelihood that someone has access to broadband internet and the likelihood that they are a single parent – all influences into whether someone may continue with their education. Furthermore, this insight can support MACC as they calibrate both individual support and interventions but plan the capacity for support and interventions for future cohorts. Using these profiles (see example profile in the image above), Deloitte would collaborate with MACC to understand how enrollment might differ across student population segments to further enhance the equity and design of a policy-based program.

The result of the enrollment forecasting analysis will provide MACC with a robust and confident enrollment projection model – along with documented assumptions and tested outlier scenarios – that can be used for further calibrated and a segmentation of their student population to support individualized student success initiatives. Armed with the projections and modeling of enrollment trends based on a free community college initiative, we will then dive into our financial modeling focused on the costs of providing that education to the expanded populations that we anticipate.

Financial Analysis

The scenario-based model will include two primary components: enrollment lifecycle and cost of delivery, which have a number of important questions that we must consider inclusive of the following categories:

- **Enrollment lifecycle:**
 - How will new eligibility criteria for free community college impact the enrollment pipeline?
 - What are the implications for retention as students persist toward degree completion?
 - Will students engage in full-time or part-time study as a result of cost decreases / elimination?
 - What policies need to be put in place to constrain or enable enrollment and persistence?

- **Cost of delivery:**
 - Given the projected student population, what are the required faculty and staff levels needed to support teaching, administration, and student success?
 - How will infrastructure and technology costs be impacted?
 - How could statewide costs shift with the potential impact on enrollment and tuition at four-year institutions?
 - Are their total costs of attendance outside of tuition, fees, books, and supplies that need to be considered such as housing, food, transportation, and childcare that if not addresses may make the program have less of an impact than intended? What would supporting those costs look like?
 - Are there potential areas of cost savings and efficiencies that could be realized at certain tiers of increasing student population?

With an enrollment growth scenario-based model that has been vetted and validated by MACC leadership, Deloitte will identify a breadth of variables that impact the costs associated with recruiting community college students and supporting their success throughout their lifecycle as a student. In addition to eligibility criteria (e.g., residency status, household income, high school attendance and performance) and enrollment funnel factors (e.g., cost per prospect, application conversion rate, etc.) a financial analysis providing MACC with

scenarios that will help determine the estimated costs of providing free community college will include student-to-faculty and student-to-staff ratios, facilities and operational costs, as well as costs directly related to student success, including academic advising and support services. Lastly, the model will include variables related to the macro-market beyond MACC's control (including demographic trends, labor costs, and inflation).

Each input used in the scenario model will be underpinned by a series of clearly documented assumptions. Inputs can be adjusted and combined in different ways, allowing the user to explore the impact of myriad permutations. By adjusting different enrollment and financial inputs, the user can estimate the sensitivity of a range of factors that MACC can control (e.g., student-to-faculty ratio), and those well beyond the control of MACC (e.g., the impact of sustained inflation in the US economy). The enrollment and financial scenario model will be created as a management tool that estimates how pulling different levers will impact enrollment levels and net financial results. Knowing it will take several years before policy changes impact community college enrollment levels, the scenario model will project associated revenues and costs five years into the future.

The development of the scenario model, including the inputs and underlying assumptions, will proceed in a collaborative and iterative fashion between MACC and the Deloitte team. Input variables and assumptions will be clearly defined and documented. Relationships between and among variables will be plainly articulated so the cause-effect connections are transparent and understood by end users. Margins of error will be applied where specific point estimates are not possible, estimating outputs as a range. Risks will be clearly documented so the implementation plan can include detailed mitigation strategies. Lastly, we will identify non-quantitative factors that might influence the evaluation of each scenario. For example, the impact on MACC's mission or level of cultural change required to pursue a particular scenario cannot be easily quantified in dollar-terms, but consideration should be included in a comprehensive evaluation.

The resulting scenario model will be used as a decision support tool, quantifying the potential impacts of a variety of program design approaches and options. The scenario model will identify and connect input variables in a logical way, simplifying complexity for decision makers by articulating a clear line of sight from cause to effect. Defining how variables connect and estimating their impact in a model also enhances communication, helping leaders develop a clear, common understanding of the context in which the free community college program will be implemented.

In addition to the scenario model, we will work with MACC to develop a set of guiding principles to support consensus decisions. Most program design decisions will not have a single correct answer. Rather, decisions will present a series of tradeoffs to consider. For example, should eligibility criteria be defined to accept the greatest number of students, or ensure they are academically prepared? When facing an impasse, a set of guiding principles can be applied to ensure processes for decision making are fair and legitimate. When committed to a clear decision-making process stakeholders can commit to consensus decisions, even when they would have preferred to embrace a different option or direction.

Compensation and Competition

MACC institutions operate in a competitive talent marketplace, and changes in the academic preparedness of students, preferences for online curriculum delivery, and shifts in academic program demand have implications for the type of faculty and staff talent that MACC must attract, hire, and retain. To inform the enrollment and financial scenario model, Deloitte will complete a compensation assessment and recommend compensation levels that will help MACC with their goal to of sufficient levels to recruit and retain the talent required to support student success and provide a high-quality educational experience. The compensation assessment will incorporate both market and internal data. Internally, Deloitte will review compensation cost trends and faculty and staff workloads alongside recruitment and retention data to understand the current state and provide

context for hypotheses and recommendations. Stakeholder interviews will include questions articulated to anecdotally understand recruitment, retention, and the workforce experience across MACC institutions.

Externally, Deloitte will use market data to assess compensation levels for different types of faculty and also staff (professional, contract, temporary) compared to peers and competitors. Market data provide a reference point that helps frame compensation decisions, but not a definitive answer. In addition, Deloitte will consider how faculty and staff are recognized and rewarded more broadly and offer ideas for creating a differentiated value proposition to current and potential employees.

Finally, combining internal and market analyses, Deloitte will estimate compensation adjustments that may be suggested, over time, for the MACC goal to hire and retain the necessary human resources, working with unions as needed, to support a free community college program. Deloitte will help MACC build a compensation model to estimate faculty and staff compensation costs over time that could be adjusted for various enrollment levels.

Funding Sources

Community college plays a unique role in advancing educational and economic opportunities for Massachusetts' first-generation, low-income, and underrepresented students. While there are many stakeholders that are eager to support these students, coordinating and deploying capital in sustainably impactful ways is a complex and challenging task. As a result, costs continue to be a barrier to attending and completing college. Estimating costs accurately is key to solving this problem.

Several approaches to funding free community college exist in other states, and MACC can inform their program design by considering the tradeoffs of different funding mechanisms. The scenario model can clearly inform strategic decision making by outlining inherent tradeoffs, estimating the sensitivity of input variables, and approximate potential risk. The model can elucidate key program design questions that must be answered before estimating costs, including:

- How will other sources of financial aid be considered inclusive of federal grants, state aid programs and the Expected Family Contribution (EFC, forthcoming as the Student Aid Index in fall 2024)?
- What are the eligibility criteria (e.g., household income, high school completion, previous degrees earned, credits per semester / full-time vs. part-time status) or is this program to be inclusive of all state residents engaging in any credit or non-credit bearing courses regardless of other factors?
- Will it be necessary for students to demonstrate progress to a credential (i.e., part-time attendance, timeframe limitations toward a credential, or current Satisfactory Academic Progress (SAP) policies already in place) or will this be inclusive without sunsets on eligibility?

Within the scenario model, financial inputs will include cost of capital estimates for leveraging federal, state, private, and philanthropic capital. Combining different sources of capital, both in the implementation and sustainment phases of a free community college program, will allow MACC to identify an optimal, sustainable, and most cost-effective scenario. An accurate estimation of the costs associated with implementing and sustaining free community college in Massachusetts will inform key program design decisions. To attract additional capital, the scenario model will also estimate the impact on workforce development, increased employment tax base, increased civic engagement, and reduced strain on social services that positively correlates with increased rates of community college degrees and credentials.

The scenario model can also identify quantitative hurdles that could prompt additional investment, so academic programs that demonstrate success can be quickly promoted and scaled.

At the conclusion of Phase 2: Deloitte will deliver a complete “baseline scenario model” in Excel format, allowing MACC to develop new (or refine existing) scenarios in the future beyond the scope of this engagement. However, the subsequent Phases will help to refine the scenario-based model and enable us to flesh out the policies and practices that will enable Massachusetts to implement the free community college program.

PHASE 2 WORK PRODUCTS & DELIVERABLES

- Baseline Scenario-Based Enrollment & Financial Model (D)
- Draft Report of Findings and Impacts from our Contextual Analysis (D)

Phase 3: Review and Assessment of Findings (~ 5 weeks)

Phase 3 aligns with the end and beginning of the calendar years, respectively, and is deliberately designed for MACC and Deloitte teams to dial down the intensity of the effort and carefully consider what has been constructed in Phase 2 and what will be needed in Phase 4 to advance the project. Deloitte will convene MACC’s Steering Committee to present the findings from Phase 2 as well as review the scenario-based model. This period enables MACC’s Steering Committee to “play” with the model, critically evaluate it and provide their feedback to the Deloitte team. That feedback will be used to adjust the scenario-based model and advance the report into a stage where key elements can be socialized with campus leaders and state stakeholders for their feedback.

In addition, Phase 3 will enable us to plan and schedule a series of campus leadership sessions as well as out-of-state discovery meetings that will take place during the late winter – early spring timeframe. While these campus working groups and out-of-state discovery meetings will take place throughout Phase 4, we will be working to schedule these meetings during the period of Phase 3 so that we are well-prepared for the next phase of work.

PHASE 3 WORK PRODUCTS & DELIVERABLES

- Update to the Baseline Scenario-Based Enrollment & Financial Model (D)
- Update to the Draft Report of Findings and Impacts from our Contextual Analysis (D)

Phase 4: Logistics and Implementation Planning (~ 13 weeks)

The objective of Phase 4 is to mature and finalize a final report that will include a range of recommendations on the design and execution of the initiative focused on costing and funding, policy and regulatory changes and outcomes and impacts. As mentioned above, more intimate conversations with peer states that have implemented similar programs can be one source of insight and would be one of the key activities in Phase 4. Advancements to the enrollment and financial model will be made informed by insights that we gather from peer states that have implemented similar initiatives and our recommendations on logistics and implementation planning need to be informed by conversation with campus leadership within the Massachusetts community colleges.

High-Impact Meetings

As previously mentioned, two genres of high-impact meetings will be a central focus of Phase 4 activities. Those include: 1) discovery meetings with out-of-state peers whose efforts to implement free community college may offer valuable insight into the constructions and/or implementation of the Massachusetts’ version of the program, and 2) campus focus group meetings with key campus leadership.

Discovery Meetings with Out-of-State Peers

Oregon, Nevada, New Mexico, Michigan, Tennessee, Maryland, Delaware, Connecticut and Rhode Island have all established free community college programs with few but various eligibility requirements. Our analysis of these state's programs in Phase 2 will help to inform which of these may be the most likely to offer insight and value to the Massachusetts effort. We will select three or four states out of this peer group collaboratively with MACC's Steering Committee and reach out to relevant state leaders to schedule either remote or in-person meetings with those states to facilitate a conversation on the impact of their programs and lessons learned. The timing of the Massachusetts effort is optimal insofar as there are enough peer states to learn from and there are a multitude of states that will follow Massachusetts; thus, your state has an opportunity to shape the trajectory of this effort more nationally.

Campus Leadership Sessions

These meetings will be designed to gain a holistic perspective on the administrative logistics and implementation planning needed to actualize such a policy in Massachusetts. We recommend campus leadership sessions include cabinet-level leaders such as the President, Chief Academic Officer, CFO, VP of Enrollment or similar, VP of Student Affairs or similar, and the Chief Human Resources Officer. The aim of these sessions will be to accomplish the following:

- socialize the baseline enrollment and financial model to obtain feedback from campuses
- discuss the administrative and logistical requirements for successful implementation of the program at the campus level
- identify campus-specific barriers to implementation and resources needs given changes in enrollment projected within the model

Deloitte will integrate feedback from the campus leaders in the final report, especially in the area of recommendations around logistics and implementation planning.

Update to Funding Sources

Once we establish a mature enrollment and financial model, inclusive of feedback and insights that have been gained from the high-impact meeting detailed above, we will then need to carefully consider the potential scenarios for funding the program. While these sources of funding can be discussed throughout the project, the reality is that the scale of the number matters and we won't have that finalized until the latter part of Phase 4 of the project. Additionally, any eligibility criteria imposed on the program will meaningfully shift the public investment needed. It is possible that some workforce related programs could be partially funded through private industry and federal student aid programs (i.e., Pell Grant) will continue to be substantial sources for lower-income students. The potential funding mix will need to be modeled considering any eligibility criteria that may be established and the appetite for state investment must be weighed against the resulting number. That appetite for state investment may in turn drive changes to the eligibility criterion and thus iterations of this funding model maybe needed.

Coalescing the Final Report

The final report will be built and iterated gradually over the course of the engagement; however, Phase 4 will provide an opportunity for refinement and feedback from MACC's Steering Committee. The report will include the following:

- An assessment of the current public higher education landscape in Massachusetts and nationally

- Potential impacts of implementing free community college on access to higher education, workforce development and economic growth in Massachusetts
- Potential design and financial models to create and sustain a free community college program in Massachusetts
- Administrative and logistical requirements for successful implementation of the program
- Recommendations on options for the design and execution of the initiative focusing on cost, associated policy and regulatory changes, as well as anticipated outcomes and impacts of those changes.
- A summary of insights gained from campus leaders and out-of-state peers
- Potential risks and mitigation strategies embedded within the plan to address those risks

While the full report may take the form of Word document sent in PDF format, we will also provide a summary presentation appropriate for socialization with key stakeholders in the final phase of the work. This final report will be delivered by April 30, 2024, per the request within the RFP.

PHASE 4 WORK PRODUCTS & DELIVERABLES

- Final Scenario-Based Enrollment & Financial Model (D)
- Final Report of Impacts and Recommendations for Implementing Free Community College within the Commonwealth of Massachusetts (D)

Phase 5: Socialization and Final Review (~ 10 weeks)

Phase 5 will take us from late April through June as we socialize the final report with key stakeholders in the Governor's office, state legislature, state agencies including the Executive Office of Education and Department of Higher Education as well as key campus stakeholders for a variety of segments including the community colleges and state universities.

The previous phases of work were focused on building a data-informed, highly collaborative, and iterative report that would be led by the Deloitte team and MACC Steering Committee yet reflect the voices of key stakeholders throughout the state and beyond. In the final phase of work, we would seek to present the resulting report to an array of stakeholders, most of which had a part in the process such as campus leaders, the Commissioner of Higher Education from the DHE and key DHE staff, as well as officials from the Governor's administration and state legislators. However, additional stakeholder voices and feedback may be very helpful at this point in the process. Some of the *additional* stakeholders that may be appropriate for a final round of socialization and review due to the direct and indirect impacts they will experience as a result of this program. Those additional stakeholders may include:

- State University leaders
- Major employers from priority sectors identified in the workforce needs analysis
- Students and families spanning both traditional aged, non-traditional adult students, full-time and part-time, representative of the demographic diversity of the community college ecosystem in Massachusetts
- Key resource partners that have been identified throughout the process related to housing, transportation, food and childcare necessary to support students engaging in and/or sustaining their educational journey

It is expected that the final report which would have been delivered by April 30th could be slightly modified by any feedback we received during this final round of socialization and feedback. Deloitte will catalogue this

feedback and elevate key themes and opportunity for refinement to MACC's Steering Committee who can make the final determination on whether to make changes to the final report.

PHASE 5 WORK PRODUCTS & DELIVERABLES

- Presentation materials for socialization of the Final Report to key stakeholder groups (D)
- Catalogue of feedback from key stakeholders (WP)

Project Timeline

Below is a graphic that reviews our approximate ten-month timeline. As detailed in our Approach above, we propose a five-phase approach and have highlighted key deliverables and points of high-engagement.

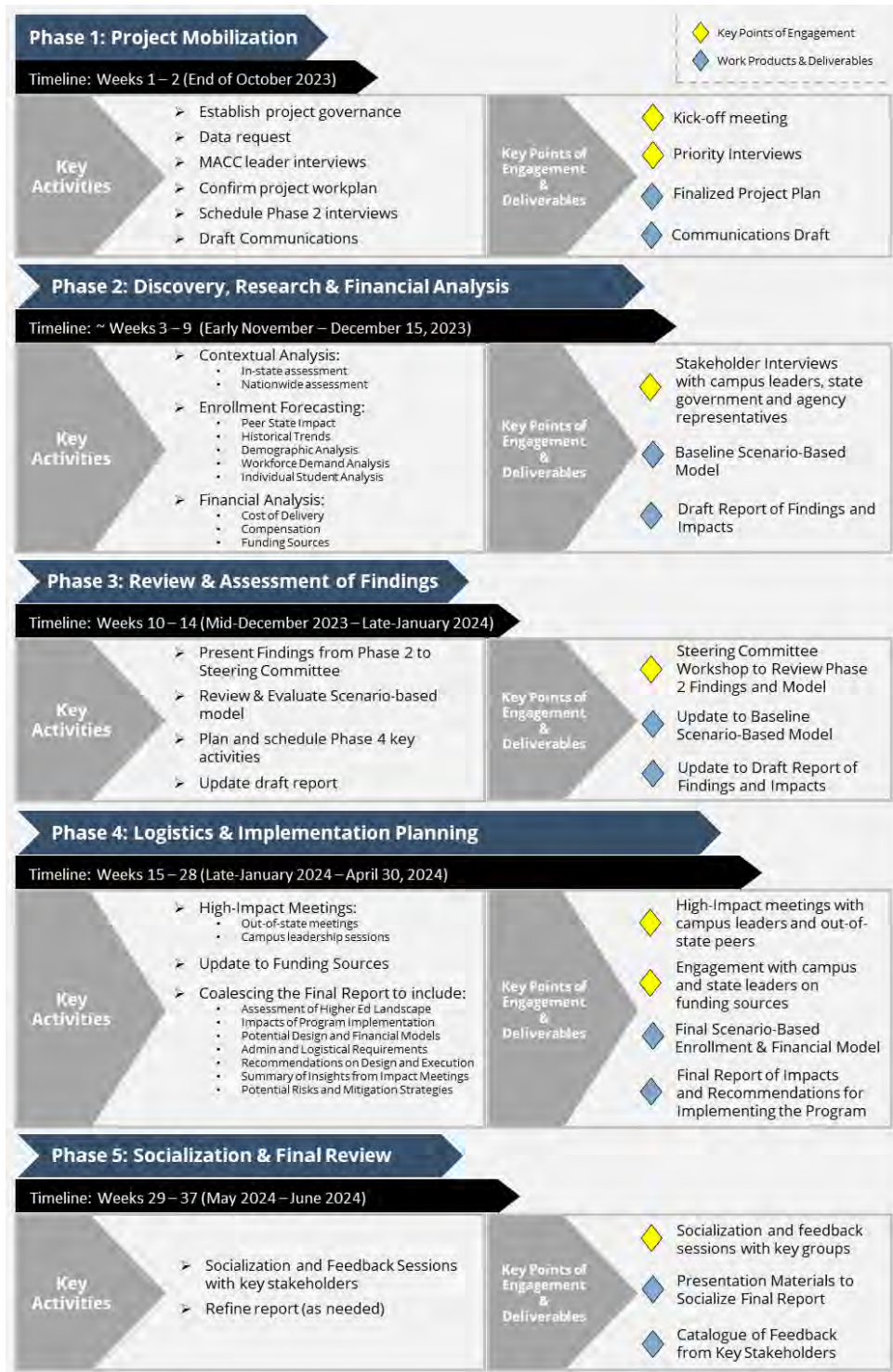


Figure 13: Project Timeline

Summary of Experience and Qualifications

Deloitte has completed over 1,000 projects with over 500 Higher Education institutions and employs more than 1,000 multidisciplinary practitioners who exclusively serve Higher Education clients and deliver services that span: Financial Management and Operational Excellence, Digital Technology Transformation, Student Experiences and Lifecycle Management, Organization, and Talent and Leadership. A differentiator in working with Deloitte is the omni-dimensional perspective that our collective teams can offer in pursuit of MACC’s objectives. This perspective is embedded within our proposed core project team and among the subject matter advisors, whose biographies you can review in the [Our Team section](#).

Our team consists of both seasoned consultants and higher education professionals that have worked within a multitude of academic institutions prior to joining Deloitte. In addition to this broad experience, our specific project experiences have prepared our team to deliver the results you have requested. Those experiences include a Student Success Framework development and implementation for the Massachusetts Department of Higher Education, a Racial Equity Strategic Plan development for the Massachusetts Department of Higher Education, an Operational Assessment for the Louisiana Community and Technical College System (LCTCS), an Enrollment Management Services assessment for the Pennsylvania State System of Higher Education (PASSHE), an Institutional Return on Investment (ROI) Study for the University of North Carolina (UNC) System, and a business model assessment for Cuyahoga Community College, all detailed below.

Relevant Project Experience

EXPERIENCE #1: MASSACHUSETTS DEPARTMENT OF HIGHER EDUCATION	
Project Name & Dates	The Massachusetts Department of Higher Education Framework for Support Services for Student Success November 2021 – June 2023
Point of Contact	Dr. Clantha McCurdy Senior Deputy Commissioner – Access and Student Financial Assistance (617) 391-6098 cmccurdy@dhe.mass.edu
Description	<p>Client Intro and Project Background:</p> <p>The Commonwealth of Massachusetts is a national leader in education spanning the K-12 and higher education sectors; however, they noticed that their graduation rates for Students of Color were only meeting national averages. The goal of the project was to create a strategic framework to align and strengthen student support services to meet the goals of the DHE’s ground breaking Equity Agenda to support Students of Color, as well as students from low-income households, in entering, persisting, and graduating from their institutions as well as launching meaningful and successful careers post-graduation.</p> <p>Project Summary:</p> <p>Deloitte conducted a current state analysis to build a common understanding of the existing student support structures throughout the Commonwealth’s state and local higher education system, focusing in on the most complex challenges and most promising opportunities for enhanced and expanded student services in support of student success. Deloitte analyzed internal and external factors, paying particular attention to student acquisition and retention, student learning and success, and key operational and financial metrics. Across all 24 institutions, Deloitte engaged with 300 stakeholders in interviews</p>

EXPERIENCE #1: MASSACHUSETTS DEPARTMENT OF HIGHER EDUCATION

and focus groups, including campus leaders, faculty, staff, and students. Deloitte evaluated campus level data and services and conducted peer comparisons with five other states and interviewed national thought leaders in student success.

Based off the current state analysis findings, Deloitte guided the DHE through a process to outline key components of the strategic framework for support services for student success. Through collaborative visioning and design sessions: Deloitte engaged system-level and campus stakeholders, listened to and discussed reflections, aspirations, and concerns that enabled the DHE to narrow a broad canvas of opportunity to key strategic framework components and make prioritized recommendations related to student support services. The design of the framework was integrated and aligned with a parallel project supported by Deloitte for the MA DHE to create a Strategic Plan for Racial Equity across the public higher education system in MA. Ultimately Deloitte provided a comprehensive strategic framework report to the DHE that included:

- Recommendations for policy change and options for implementing and aligning support services across the system.
- Opportunities for process alignment, service integration and data sharing to improve access to information and services.
- Priorities for expansion or enhancement of support services that would be scalable and sustainable.
- Implementation pathways that provided options for prioritizing recommendations in a way that would align with campus-level priorities and ongoing efforts.
- Recommended approach for evaluating student support services over time to understand their impact on student success and support the future evolution of the strategic framework.

Deloitte was then retained to support the MA DHE in implementing the framework across its system including: supporting the DHE to identify priority outcomes and state-level support needed for Framework implementation, conducting prioritization and readiness assessments at the campus level for all 24 in-scope campuses, conducting resource assessments at the campus level and stand-up campus-level implementation teams, and conducting a campus-level data maturity assessment to identify the current state of data tools, access, and utilization for student support services.

Impact:

- **Created a shared vision for support services across a disparate system:** The system now has a common framework to align twenty-four independent public institutions that had previously been building support services in isolation.
- **Enabled focused investment and effort to maximize impact:** Campuses as well as the larger system were able to focus their energy and investment in a limited set of areas to impact student outcomes that mattered most to the client.
- **A roadmap forward and implementation support:** The MA Board of Higher Education unanimously accepted the framework and directed the MA DHE to move forward with implementation. Deloitte provided a roadmap and is supported campuses in integrating the framework into their ongoing efforts and strategic plans.

EXPERIENCE #2: MASSACHUSETTS DEPARTMENT OF HIGHER EDUCATION	
Project Name & Dates	The Massachusetts Department of Higher Education (DHE) Strategic Plan for Racial Equity July 2021 – April 2023
Point of Contact	Elena Quiroz-Livanis Assistant Commissioner for Academic Policy & Student Success; Chief of Staff (617) 418-0700 equiroz@dhe.mass.edu
Description	<p>Client Intro and Project Background:</p> <p>In 2018, the Massachusetts Board of Higher Education (HE) set forth the Equity Agenda, a Commonwealth-wide policy and performance priority to significantly improve enrollment, attainment, and long-term success outcomes among Students of Color. As part of the Equity Agenda effort, the Board committed to developing a 10-year Commonwealth-wide Strategic Plan focused on advancing racial equity. Deloitte supported the Commonwealth’s Board of HE and DHE in developing and publishing the 10-year Commonwealth-wide Strategic Plan for Racial Equity in partnership with all 27 public higher education institutions in MA.</p> <p>Project Summary:</p> <p>Deloitte supported the drafting of <i>The New Undergraduate Experience: A Vision for Dismantling Barriers, Recognizing Students’ Cultural Wealth, and Achieving Racial Equity in Public Higher Education in Massachusetts (NUE)</i>. This seminal report served as the vision document for the Strategic Plan for Racial Equity. The NUE provides ideas and recommendations for the Commonwealth-wide strategic plan. In addition to assisting the DHE in drafting the NUE, Deloitte also helped to engage a group of more than 60 diverse higher education stakeholders from across the Commonwealth to inform the NUE.</p> <p>Deloitte conducted an environmental scan of the Commonwealth’s public higher education system, collecting and analyzing the data across the Commonwealth’s community colleges, state universities, and three UMass campuses. Deloitte also launched the Commonwealth’s first ever system-wide survey which garnered more than 7,000 responses to gather sentiment related to the Commonwealth-wide Strategic Plan for Racial Equity. Lastly, Deloitte facilitated interviews and focus groups with approximately 200 key stakeholders to understand the system’s racial equity strengths and challenges.</p> <p>Deloitte conducted several different immersive Strategy Labs with stakeholders across the Commonwealth to validate and reflect on the Environmental Scan results, formulate a mission and vision, and define actionable solutions for the Strategic Plan for Racial Equity. Deloitte also drafted communications materials for publication of the plan. To support DHE with implementation of the plan, Deloitte developed a marketing plan to raise awareness about the plan, a stakeholder engagement plan to increase buy-in, a project plan, and a Racial Equity Toolkit to support institutions with implementation.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Created a shared vision for racial equity across a disparate system: The system now has a common mission, vision, goals, and strategies for achieving racial equity across the system over the next 10 years. • A project plan for the way forward and implementation support: The MA Board of HE accepted the Strategic Plan and directed the MA DHE to move forward with implementation. Deloitte helped launch DHE’s implementation efforts including developing a project plan that organized DHE’s actions.

EXPERIENCE #3: LOUISIANA COMMUNITY AND TECHNICAL COLLEGE SYSTEM (LCTCS)

<p>Project Name & Dates</p>	<p>LCTCS Operational Assessment March – June 2021</p>
<p>Point of Contact</p>	<p>Monty Sullivan President (225) 922-1643 montysullivan@lctcs.edu</p>
<p>Description</p>	<p>Client Intro and Project Background:</p> <p>Despite recent efforts to adapt to the evolving marketplace, the Louisiana Community and Technical College System (LCTCS) continues to face the economic challenges we are seeing across much of higher education, and which have been exacerbated by the COVID-19 pandemic: including declining population, growing poverty rates, increased competition, and reduced enrollment at its rural campuses. Deloitte’s Higher Education practice was asked to review the System’s administrative operations and programming across their 12 colleges and develop a financial framework and set of opportunities to help the System to stabilize and grow its campuses, particularly those located in rural communities.</p> <p>Project Summary:</p> <p>Through detailed analysis of the System’s monthly cash balance trends and monthly trial balance data, Deloitte assessed the capability of colleges to weather potential changes to enrollment and revenue. This financial model was supplemented by an analysis of LCTCS documents and data, as well as interviews with over 25 individuals across System and College Leadership. The work culminated in a current state report identifying overarching gaps and opportunities, with the goal of enabling LCTCS to plan its future strategy and sustain financial health.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Developed a menu of opportunities to help LCTCS sustain financial health. Deloitte uses the current state findings and analysis to develop a menu of ~30 opportunities to help LCTCS sustain financial health. These opportunities were crafted to help LCTCS: reduce operating costs to stabilize finances and position rural campuses to withstand significant changes in revenue, enable colleges to serve a broader range of customers to increase enrollment and educational opportunities at rural campuses, improve the student experience to increase retention and completion rates across colleges, reduce the financial gap to an affordable and quality education, maximize resources to scale efficiencies and balance the costs of delivering instruction, and improve the System’s ability to meet current and future workforce demands to help reduce jobs shortages across the State. • Developed a predictive modelling tool. Deloitte provided System Leadership with a predictive modeling tool, which modeled two potential future state scenarios including: 1) Reduction in state appropriations, and 2) Decrease in student enrollment to forecast the financial impact across LCTCS and to allow for more proactive and strategic decision making.

EXPERIENCE #4: PENNSYLVANIA'S STATE SYSTEM OF HIGHER EDUCATION (PASSHE)

Project Name & Dates	PASSHE Systemwide Enrollment Management Services July - October 2020
Point of Contact	Dan Greenstein Chancellor (717) 720-4000 dgreenstein@passhe.edu
Description	<p>Client Intro and Project Background:</p> <p>In 2019, Pennsylvania's State System was preparing for future transformation through its multi-phase redesign process and sought support to guide its universities in developing and implementing modern Strategic Enrollment Management (SEM) approaches, including pricing and financial aid optimization strategies as well as student success technical services.</p> <p>Project Summary:</p> <p>To support this decision-making process, Deloitte performed a high-level assessment of alignment opportunities for each of the candidate integrations on the potential value the combinations would provide to the System and the impacted institutions. These opportunities spanned both the academic portfolio and administrative services, and the analysis included but was not limited to a review of the academic portfolios to assess gaps, overlap, and consistency with projected labor market demand; and operational considerations, including facilities, administrative operations, athletics, etc. We also performed a five-year financial projection for each of the candidate integrations, including enrollment impacts; revenue and expense impacts; asset, liability, reserve, and investment impacts; and local community, affiliated entity, and use of non-appropriated funds impacts. To determine if PASSHE had an understanding of the potential implications, the analysis considered what might be expected from the combinations in relation to what might be expected if the candidate institutions remained separate and instead took actions to attempt to secure their independent financial stability.</p> <p>Deloitte also created a high-level implementation roadmap, plotting the detailed work to take place upon Board approval. This roadmap included a recommended team, structure, milestones, deliverables, consultation, and stakeholder engagement path. To promote consistent, transparent, and disciplined messaging of such a complex project, Deloitte also supported change management and communications activities across the System and the candidate institutions throughout the analysis. We created a stakeholder analysis of community groups across all impacted institutions, as well as a change and impact analysis to forecast the potential impacts of the integrations on those groups.</p> <p>Impact:</p> <ul style="list-style-type: none">• Developed Strategic Enrollment Management (SEM) Approaches. Deloitte provided support to guide the PA universities in developing and implementing modern SEM approaches to help the State System prepare for future transformation through its multi-phase redesign process. Deloitte provided pricing and financial aid optimization strategies as well as student success technical services. This effort directly connected to the Board of Governors' priorities to enable student success, broaden access and affordability, maximize student academic progress, and leverage university strengths.

EXPERIENCE #5: THE UNIVERSITY OF NORTH CAROLINA (UNC) SYSTEM

<p>Project Name & Dates</p>	<p>UNC System Return on Investment (ROI) Study April 2022 – Fall 2023</p>
<p>Point of Contact</p>	<p>Andrew Kelly Senior Vice President for Strategy and Policy (919) 843-0450 apkelly@northcarolina.edu</p>
<p>Description</p>	<p>Client Intro and Project Background:</p> <p>Given declining public confidence in the value of college, the NC General Assembly commissioned a study to assess the ROI of each degree program offered by the 16 institutions of the UNC System. Deloitte helped the UNC System create a transparent data set and multiple dashboards to look at college degree ROI from student and state views.</p> <p>Project Summary:</p> <p>Deloitte conducted interviews with senior leaders from the system and all 16 institutions and collected systemwide HR, Finance, and Student data (48+ million records), as well as wage data from the NC Department of Commerce. Deloitte used the insights gained from these activities to develop key metrics to address the NC General Assembly’s request.</p> <p>Deloitte visualized key metrics and data in three Tableau dashboards for all 16 UNC System institutions by: creating Wireframes in Figma to align on dashboard metrics, form, and function, developing Tableau dashboards through 4-week sprints (including development, reviews, and refinements), and generating buy-in with over 1,000 feedback items from 100+ UNC stakeholders.</p> <p>Deloitte created a report to accompany the dashboards and provide additional context by summarizing key components of analysis and takeaways in seven executive insights, providing market context of the UNC System role on talent in the NC economy, and identifying multiple potential areas for further study and analysis moving forward.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Cross-Institutional Data Alignment: Though institutions are unique, analyzing System data was a foundational element. This required validating, refining, and auditing centralized data sources, resulting in alignment and understanding of centralized data used for the dashboards and will be a long-term UNC value add. • Solid Foundation, Strong Momentum: This study can serve as the foundation for creating a tool that enables students to transparently evaluate the return on investment of higher education degree programs. The Student ROI Dashboard catalyzes visualizing a Student’s Lifetime ROI, creating a unique lens from which to understand how student pathways impact future earnings and economic mobility. • Holistic Perspective on ROI: While using the mandate from the North Carolina General Assembly as a starting point, the study considers a holistic view of ROI by including metrics beyond financial return, resulting in a package that both addressed the study parameters and serves as a valuable resource to the UNC System and institutions. Furthermore, this study identified potential areas where UNC may seek to collect additional data that will further insights in future studies.

EXPERIENCE #6: CUYAHOGA COMMUNITY COLLEGE (TRI-C)

<p>Project Name & Dates</p>	<p>Cuyahoga Community College Business Model Assessment May 2023 – July 2023</p>
<p>Point of Contact</p>	<p>Renee Tramble Richard, Esq. President & CEO, Corporate College (CC); Interim GC, Tri-C (216) 987-4865 Renee.Richard@tri-c.edu</p>
<p>Description</p>	<p>Client Intro and Project Background:</p> <p>Founded in 1963 as Ohio’s first and largest community college, Cuyahoga Community College (Tri-C) has provided high-quality, affordable education and programs to more than 1 million community members. Tri-C’s professional services division, Corporate College (CC), sought to evaluate their existing pricing strategy, revenue and cost allocation methodology, and alignment of academic programs between CC and Tri-C’s Workforce division.</p> <p>Project Summary:</p> <p>Deloitte performed a current state assessment to gain an understanding of CC’s business model, which included soliciting data from the financial and course management systems and reviewing pricing model, rate structure system, overhead cost allocation, and existing accounting methods. Deloitte assessed enrollment and financial challenges to achieving self-sustainment by facilitating interviews with over 13 key leaders and business process owners and by engaging the CC President and Tri-C President to understand their vision for the future. Deloitte assessed program management processes and data to inform best practices by identifying inconsistencies in course and enrollment data which inhibited program profitability analysis and by documenting limitations of campus Learning Management System.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Developed future state budget model. Deloitte developed a future state budget model, with revised overhead cost allocation calculations, which aligned with Tri-C leadership’s and the Budget Office’s financial goals and Workforce Divisions. As part of the model, Deloitte created scenario analysis for CC financial performance leveraging an incremental application of the Overhead Cost Allocation. • Advised leadership on alignment opportunities between CC and Workforce Divisions. Deloitte refined both differentiators and synergies for each division. Further, Deloitte clarified opportunities for collaboration and creation of shared services related to marketing, selling, and program management. • Created opportunity catalog to address key financial and operational challenges. Deloitte identified methods to better integrate Enrollment Management system to improve data quality and registration process. Deloitte presented necessary updates to fix the Chart of Accounts. • Presented options for consolidating academic offerings and revising service delivery model. Deloitte proposed consolidation of course offerings to decrease administrative burden and recommended revision of organization structure and service delivery model to include key shared services.

EXPERIENCE #7: UNIVERSITY OF LOUISIANA SYSTEM

<p>Project Name & Dates</p>	<p>University of Louisiana System Systemwide Administrative Assessment May – August 2022</p>
<p>Point of Contact</p>	<p>Cami Geisman Vice President for External Affairs and Chief of Staff (225) 219-0270 camigeisman@ulsystem.edu</p>
<p>Description</p>	<p>Client Intro and Project Background:</p> <p>The University of Louisiana System (ULS) is the largest higher education system in Louisiana, encompassing nine institutions with over 90,000 students. Recent enrollment challenges coupled with flat state appropriations and increasing expenses have created a compelling case for change, whereby ULS sought to identify ways to better leverage the synergies and strengths of the System and operate in a more nimble, effective, and efficient manner. Put simply, ULS was staring down the projected enrollment cliff, potential funding gaps, and uneven state support – and wanted to take action to proactively address challenges.</p> <p>Project Summary:</p> <p>To help accomplish this goal, ULS partnered with Deloitte’s Higher Education practice to help identify opportunities for sustainable, transformative solutions to further enable ULS to deliver its mission. In addition to broad stakeholder engagement, providing color and context to the current state and the institutions’ specific missions, the Deloitte team built a dynamic financial model to project potential future financial performance, based on recent enrollment and financial trends. The model was stress-tested, whereby a range of potential scenarios driven by additional financial ‘shocks’, for example, enrollment fluctuation, increased tuition discount rates, and declines in state support, were developed. These potential market and industry challenges and the range of financial impacts created a compelling case for transformation and growth.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Developed final assessment report. Deloitte delivered a final report, including a current state assessment, financial model, future state recommendations, a case for change and plan for implementation. • Developed menu of opportunities. Deloitte developed a menu of 7 future state opportunities, including 24 detailed initiatives across these areas, based on current state findings and analyses. • Facilitated strategic workshops. Deloitte facilitated three workshops with System leadership, including a visioning session, current state assessment and future state opportunity workshop.

Additional Project Experience Examples

ADDITIONAL EXPERIENCE #1: GLOBAL FOUNDATION	
Project Name & Dates	Global Foundation Higher Education Strategic Assessment April 2017 – January 2018
Description	<p>Client Intro and Project Background:</p> <p>In partnership with a large global foundation, Deloitte’s Higher Education Student Success Team studied ten two- and four-year institutions (including Community Colleges) that have undergone institutional transformation with the goal of improving student success and organizational effectiveness while maintaining accessibility.</p> <p>Project Summary:</p> <p>In collaboration with the foundation, Deloitte collaborated with 10 higher education institutions (community colleges, colleges, and universities) to perform data analysis, site visits, interviews, and research with the goal of improving student success. Deloitte observed several findings that consistently manifested across the institutions’ journeys of transformation, such as deep institutional commitment to student success, different approaches to multiple paths, and success through varying degrees of transformation, whether rapid shifts or more gradual changes, despite constraints.</p> <p>In the final results, Deloitte recognized that the 10 institutions remained accountable to serving a local population by maintaining accessibility via reasonable and stable entrance requirements, community partnerships, and moderate tuition, and acting as engines of opportunity for their regions. The schools focused on growing their footprint in their defined service areas and being responsive to demographic trends and workforce needs, while prioritizing sustainability over rapid growth given their resource constraints and access missions. The institutions exhibited a remarkable degree of tenacity and pragmatism in acknowledging financial constraints but did not accept them as an excuse to deviate from focusing on students. They prioritized and only pursued a certain number of initiatives at one time and constantly evaluated effectiveness of investments and programs, scaling down or stopping initiatives when they did not produce the desired results.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Aggregated Best Practices to Improve Student Success. After drafting detailed synthesized case studies for each of the ten institutions, the Deloitte team developed a final model aggregating practices across college and university capacities and interventions which can be shared with the higher education field for insight and reflection by other campuses nationally. • Identified a Framework for Maximizing Success Despite Limited Resources. Through extensive data analysis, site visits and interviews, and research across the field, the team observed a consistent five-stage journey across institutions that led to significant transformation despite constraints: <ol style="list-style-type: none"> 1. Catalysts for Change 2. Preconditions for Transformation 3. Assessing & Making Choices 4. Implementing & Managing Change 5. Sustaining Transformation

ADDITIONAL EXPERIENCE #2: U.S. DEPARTMENT OF EDUCATION

<p>Project Name & Dates</p>	<p>U.S. Department of Education Regulatory Impact Assessment September 2021 – September 2022</p>
<p>Description</p>	<p>Client Intro and Project Background:</p> <p>Deloitte provided the U.S. Department of Education (ED) support around Regulatory Impact Analysis and public comments review for the Negotiated Rulemaking for Higher Education 2021-22, which focused on negotiated regulatory changes for the programs authorized by Title IV of the Higher Education Act of 1965, as amended.</p> <p>Project Summary:</p> <p>As part of the Regulatory Impact Analysis, Deloitte was responsible for creation of literature reviews for 6 proposed regulatory changes, which included conducting and summarizing in depth research on specific topics and regulations, reading stakeholder testimonies to understand and communicate key goals and challenges of the proposed changes, and virtually attending negotiated rule making committee meetings for each of those six regulatory changes.</p> <p>Upon completing research and stakeholder due diligence, Deloitte summarized the need for each regulatory change, developed a literature review of the topics related to the regulatory changes, and developed a Cost/Benefit analysis of the proposed changes. This included quantifying impacts of the regulatory changes, as well as providing a qualitative analysis of societal and stakeholder benefits and associated costs. Deloitte worked closely with ED Subject Matter Experts on the regulatory topics to review and refine the Regulatory Impact Analysis, and to answer any comments or concerns from OMB to gain final approval for the publication of the Notice of Proposed Rulemaking (NPRM) for public comment.</p> <p>Throughout the public comment period, the comments were individually reviewed for relevance, and PII and PHI, and were filtered to ensure that the public comments that were published adhered to the public comment rules. Upon the completion of the public comment period, Deloitte was then responsible for reviewing each comment and grouping them to the appropriate proposed regulatory change to enable ED to respond to each comment effectively, and to consider public feedback and potentially include it in the NPRM.</p> <p>Impact:</p> <ul style="list-style-type: none"> • Aggregated Proposed Regulatory Changes: Deloitte reviewed over 4,000 comments that were received from the public comments process. Using the RegExplorer tool, Deloitte was able to group comments by appropriate topics using key words. • Created Comment Summaries and Synthesized Common Themes: From there Deloitte created comment summaries which synthesized the common themes, suggestions, and questions from the comments for each topic and tagged each individual comment to the theme or topic. • Developed Dashboard Analytics: Deloitte also utilized the RegExplorer tool to generate a number of Tableau dashboards to help ED further understand the recurring themes and sentiment from the public and stakeholders.

Our Team

Our Deloitte team will bring the right combination of experience and expertise to deliver the engagement's requirements. We bring a collaborative "hands-on" teamwork style and want to offer MACC both project oversight and the availability of our senior leaders and subject matter advisors (SMAs) who will work closely with you to achieve the goals of this effort.

Deloitte will provide a core team for the full duration of the engagement to work hand-in-hand with MACC leaders, bringing in Deloitte SMAs to inform and help facilitate activities as needed. Our core team will be supported by a team of analysts for data and materials preparation that can scale based on the number of assessments underway. This flexible structure will enable Deloitte to scale support up or down based on specific project needs, providing ample backup support throughout.

The following outlines the proposed organizational chart for the project team. Please note that project team members will be finalized prior to project start; MACC will have the opportunity to review resumes and/or interview any proposed Deloitte personnel.

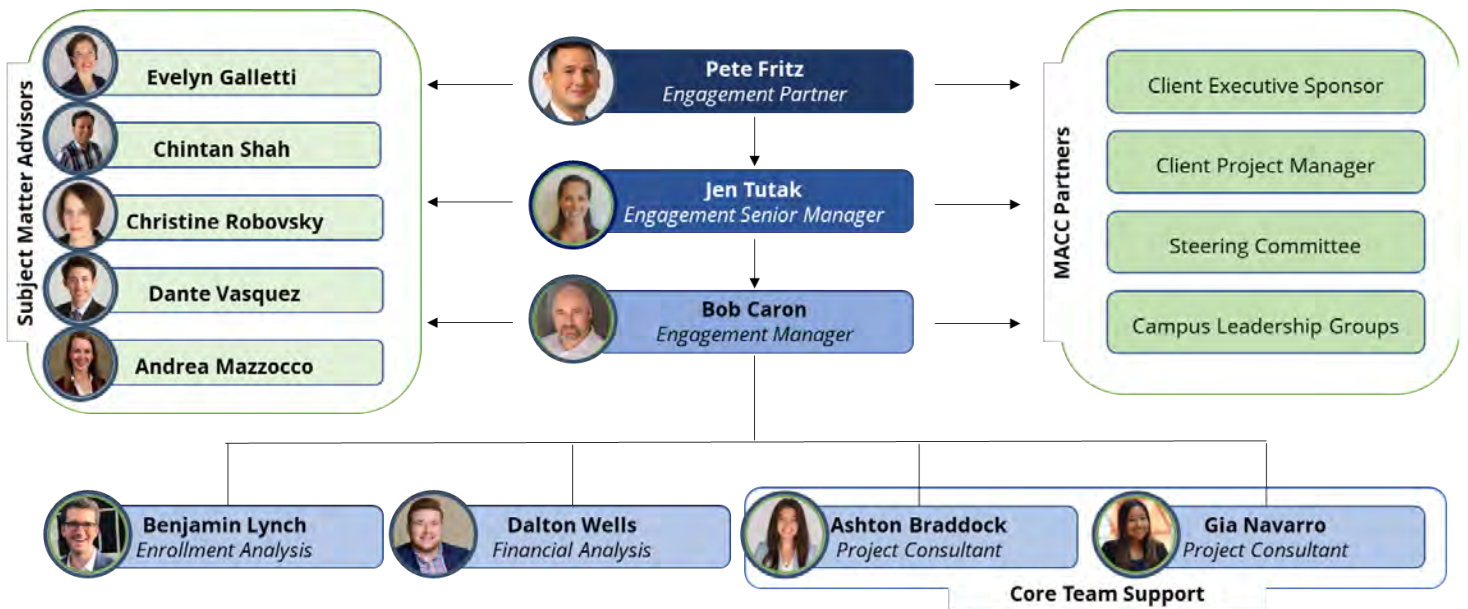


Figure 14: Proposed Project Team

Resumes are provided below for the proposed team and subject matter advisors.

Proposed Core Project Team



Peter Fritz, Engagement Partner

Pete is a Principal in Deloitte US Consulting's Higher Education practice. He leads Deloitte's Higher Education Analytics capability and focuses on helping higher education institutions utilize data-driven approaches to identify areas of financial and operational improvement and to build the analytical capabilities needed to maintain high levels of efficient performance. Pete has twenty years of strategy and management consulting experience and has focused exclusively on university, college, and post-secondary organizations since 2009. He has partnered with numerous higher education institutions on engagements related to institutional strategy, enterprise analytics, organizational resource allocation, and enrollment and student lifecycle management.

Pete brings not only a deep understanding of the challenges these institutions face and the opportunities for improvement which exist, but also an appreciation for the complex organizational and cultural dynamics which must be navigated to help create transformational improvement.

Education

M.P.P., University of Michigan – Ann Arbor
M.B.A., University of Michigan – Ann Arbor
B.A., Dartmouth College

Sample of Relevant Experience

Strategic and Operational Analytics; University System of Georgia: Led team to develop foundational data and analytics governance, processes, and technological needs to more effectively manage information across USG's twenty-six member institutions. Currently working with USG to develop an initial set of dashboards for high-priority strategic and operational metrics shared across the System as well as a longer-term implementation roadmap for building stronger data & analytics capabilities within the System office and for each member institution.

Enrollment Management Transformation; Michigan State University: Led initial assessment and subsequent implementation support program to transform MSU's undergraduate enrollment strategy and operations including organizational redesign, modernization of financial aid strategy, optimization of recruiter territory deployment, development of enrollment analytics engine and dashboards, and branding and marketing messaging development, leading to \$5M+ of annual net tuition revenue improvement.

Framework for Support Services for Student Success; Massachusetts Department of Higher Education: Led a current state analysis to build a common understanding of the existing student support structures throughout the Commonwealth's 15 community colleges and nine state institutions. Outlined key components of the strategic framework for support services for student success, which was integrated with a parallel project to create a Strategic Plan for Racial Equity. Made recommendations including opportunities for process alignment, service integration, and data sharing to improve access to information and services, as well as priorities for expansion or enhancement of support services that would be scalable and sustainable. Conducted follow up prioritization and readiness assessments at the campus level for all 24 in-scope campuses and led a campus-level data maturity assessment to identify the current state of data tools, access, and utilization for student support services.



Jen Tutak, Engagement Senior Manager

Jen Tutak is a Senior Manager within Deloitte’s Higher Education practice, with a focus that includes student success. With 15 years in higher education and more than ten years at Deloitte, Jen has strong interest in strategy and design, process improvement, and culture transformation, especially at the intersection of education, business, and government. Jen has helped numerous institutions develop technology-enabled student experience transformation, as well as supported culture transformation in broader government efforts. She co-authored *Success by Design: Improving Student Success in Higher Education*, which had over 50,000 views. Before Deloitte, Jen worked as an Admissions Director at the University of Hawaii and as a research analyst at the Harvard Graduate School of Education.

Education

M.B.A., Massachusetts Institute of Technology
M.P.A., Harvard Kennedy School of Government
M.E., Harvard Graduate School of Education
B.A., Dartmouth College

Sample of Relevant Experience

Framework for Support Services for Student Success; Massachusetts

Department of Higher Education: Conducted a current state analysis to build a common understanding of the existing student support structures throughout the Commonwealth’s 15 community colleges and nine state institutions. Guided the DHE to outline key components of the strategic framework for support services for student success, which was integrated with a parallel project to create a Strategic Plan for Racial Equity across the public higher education system. Made recommendations including opportunities for process alignment, service integration, and data sharing to improve access to information and services, as well as priorities for expansion or enhancement of support services that would be scalable and sustainable. Conducted follow up prioritization and readiness assessments at the campus level for all 24 in-scope campuses and led a campus-level data maturity assessment to identify the current state of data tools, access, and utilization for student support services.

“Lean” Model Student Success Transformation; Global Foundation: Developed a higher education transformation model for “lean” institutions needing to prioritize choices in how to best improve student success outcomes, particular for first-generation, low-income, and underrepresented minority undergraduates. Conducted deep dives with five community college partners and five four-year institutions to build detailed case studies regarding financial models, background context, capacities, and interventions, which became a strategic model for student success for potential use by any lean institution in America.

Workforce Ecosystem Planning; Claude Moore Scholars Foundation: Facilitated strategic planning process and model design to scale services to Commonwealth of Virginia for education to workforce healthcare pipeline including through the community college system. Conducted internal and external discovery to ascertain model design needs, built partnerships by convening diverse ecosystem players across K-12, community college, 4-year university, government, employer, nonprofit, and funder stakeholders during three strategy labs and five focus groups, and interviewed and incorporated the voice of the students. Created multi-year workplan for strategy design implementation and enabled future ecosystem collaboration.



Bob Caron, Engagement Manager

Bob Caron is a Specialist Master in the Higher Education, Strategy & Analytics practice where he leads a broad array of strategic and transformational efforts including operational and administrative assessments, student success, enrollment management, alumni engagement and advancement, career and academic programming. Bob spent 17 years working in Academic Affairs as a Dean, faculty member and researcher. He translates that experience into adding value to our clients while building rapport and credibility. Bob is an expert in strategic planning and has considerable experience with academic programming, online learning, learning management and early warning systems aimed at enhancing student success. He is uniquely capable of aligning stakeholders within the complex environment of an academic community. He has served on multiple large-scale NIH research projects and regularly publishes within Deloitte's Center for Higher Education Excellence. Bob has a background in leadership development and small business entrepreneurship.

Education

Sc.D., Boston University
M.A., Assumption University
B.A., Assumption University

Sample of Relevant Experience

Framework for Support Services for Student Success; Massachusetts

Department of Higher Education: Conducted a current state analysis to build a common understanding of the existing student support structures throughout the Commonwealth's 15 community colleges and nine state institutions. Guided the DHE to outline key components of the strategic framework for support services for student success, which was integrated with a parallel project to create a Strategic Plan for Racial Equity across the public higher education system. Made recommendations including opportunities for process alignment, service integration, and data sharing to improve access to information and services, as well as priorities for expansion or enhancement of support services that would be scalable and sustainable. Conducted follow up prioritization and readiness assessments at the campus level for all 24 in-scope campuses and led a campus-level data maturity assessment to identify the current state of data tools, access, and utilization for student support services.

Strategic Planning; University of New Mexico: Bob led a strategic planning engagement with UNM Health and Health Sciences, an enterprise that included both the academic enterprise (Health Sciences Center) and the broader health system (UNM Health). As a result of the project management and governance provided to the client, alongside the facilitation of an approach that engaged thousands of stakeholders in the overall strategic planning process, the enterprise had a strategic plan and accompanying support materials that guided its 5-year implementation, enhancing the organization's ability to achieve its ultimate goal to improve health for all New Mexicans and the health care workforce of the state.

Strategic Planning; The George Washington University: Bob led the strategic planning engagement with a top-25 law school and navigated a complex political environment with a new dean of the law school and a strong faculty governance model, resulting in the faculty approving the 5-year strategic plan without a dissenting voice. In this role, he conducted a current state assessment that provided

data-driven insights and engaged 150+ stakeholders along with an environmental scan including 15 peer institutions. This resulted in creating the vision statement and comprehensive strategic plan, guiding the leadership through a series of difficult decisions about their future in a resource constrained environment, while setting the client up for a successful implementation.

Strategy and Operational Planning Assessment; Large State Research Institution:

Bob supported a comprehensive operational and administrative assessment that included all functional areas outside of Academic programming. He contributed to conceptual development and deliverable build-out for current and future state analyses with identification of cost savings opportunities. He also led communications with VPs and Deans and interviewed those leaders. He negotiated difficult conversations with clients to enable accuracy and relevancy of the deliverables within the complex financial, political, and operational environment.



Benjamin Lynch, Enrollment Analysis

Benjamin Lynch is a Manager within Deloitte's Government and Public Service (GPS) practice. Benjamin holds a PMI Project Management Professional (PMP) certification and has extensive experience supporting large-scale projects implement scalable organization solutions, operational models, and standard operating procedures to kick-off projects on the right foot. Benjamin enjoys leading teams working at the intersection between strategy and operations, working hand-in-hand with clients to translate strategic planning into implementable solutions. With an analytical background, Benjamin differentiates himself by working to align data with strategic goals and action plans to manage performance. Prior to Deloitte, Benjamin worked with Teach For America and has a particular passion for educationally-driven missions.

Education

M.P.P., University of Virginia
B.A., Wake Forest University

Sample of Relevant Experience

Product Manager; AI/ML Predictive Analytics Higher Education-Focused Asset:

Benjamin was the product manager for Candidate360, a certified-to-sell AI/ML predictive analytics strategy and analytics Asset focused on providing institutions of higher education with insights throughout the enrollment cycle. As of June 2020, Candidate360 has been deployed at Michigan State University and Deloitte is developing instances for two new graduate school clients. Benjamin led the identification, defining, and translating of requirements and user stories on behalf of a client to a technical team of engineers to build a graduate school-focused dashboard.

Educational Policy Assessment; National Non-Profit Education Policy Advocacy Organization:

Benjamin assessed the soundness of statistical methodology of cited education policy research, strengthening the organization's pool of supporting materials. He also directed the development of a three-step quantitative analysis professional development training program for associates (interns) and new-hires. He oversaw the initial implementation of the training program and led the first presentation. Benjamin created professional one-page, two-page, and comprehensive portfolio templates for his research on state regulatory processes.

Policy Analysis; Municipal Government: Benjamin conducted a policy analysis of a municipal government's budget process. He focused on areas of the local

government that had not yet identified performance management goals in order to achieve a higher level of service for the budget office. During this analysis, Benjamin projected revenue and expenditure growth over the next seven years using multiple discount rates, and reviewed the City's performance metrics. Additionally, he forecasted tax revenues using economic trends and comparable localities as benchmarks. After conducting a stakeholder analysis, calculating potential cost-savings, and reviewing implementation challenges, Benjamin made actionable recommendations to the client, coupled with implementation strategies.



Dalton Wells, Financial Analysis

Dalton Wells is a Senior Consultant in Deloitte's Strategy & Analytics practice with more than 6 years of experience where he has led and supported numerous strategic transformation projects for Federal and non-profit clients. Recently, Dalton has supported a Federal housing agency in developing a strategic plan and corresponding implementation plan to guide its future IT modernization efforts, an independent Federal agency in a strategic transformation of its operating model and procedures, and a Federal agency's loan program with strategic planning for its technology modernization efforts. Additionally, he has a background and experience in financial management and analysis.

Education

M.P.P., The George Washington University
B.B.A., Loyola University Maryland

Sample of Relevant Experience

Social Media Analysis; Federal Health Non-Profit Affiliate: Dalton used social media listening tools for a Federal Health Agency Non-Profit Affiliate to track public perception of the COVID-19 mitigation strategies in K-12 schools so that the organization could 1) combat misinformation and disinformation related to COVID-19 and the mitigation strategies and 2) issue supplemental guidance to provide clarity and improve the adoption of COVID-19 mitigation strategies. He drafted topic queries for data collection and topic themes for analysis to provide insights into relevant social media and online activity related to this effort and identified topics of interest by the organization. Dalton also created a report on the loss of trust in the Federal Health Agency Non-Profit Affiliate—and its affiliated Federal agency—and presented his findings and recommendations on how to repair trust to the COVID-19 task force.

Strategic Planning and Financial Management Analysis; Federal Health Agency: Dalton served as the deputy project manager and led the development of five deliverables that culminated in an Analysis of Alternatives (AoA) for the Agency's managerial cost accounting solution. He developed the materials for and facilitated two workshops with key Agency stakeholders to validate their current state, identify future state needs, and prioritize the Agency's requirements. Dalton developed a costs analysis to assess the expected costs of various marketplace solutions compared to the Agency's steady state solution. In addition to the AoA, he identified opportunities for the Agency to streamline its processes, standardize its operations, and improve the reliability of its data.

Strategic Planning; Independent Federal Agency: Dalton led the development of an implementation strategy and roadmap for the Agency to redesign its operating model and processes, improve its talent recruitment and retention, and to streamline manually-intensive tasks and reallocating the labor hours to higher-

cognitive tasks. He designed two data pilots for the Agency to test proof-of-concepts that emerged from research and stakeholder engagement efforts that could be incorporated into the Agency's operations to automate highly manual, low-cognitive activities. Dalton created a high-level communications strategy to guide the Agency as it begins to initiate the proposals he outlined in the implementation strategy and roadmap—including key change management activities the Agency will need to action as it informs stakeholders of the forthcoming changes.



Gia Navarro, Project Consultant

Gia has a strong background in project management, process improvement, and strategic planning. Recently, Gia supported a strategic planning engagement for a large state university's health sciences center and health system. She has also supported a comprehensive assessment of a public, R1 university's financial functions, where she provided recommendations and strategies to advance the university's functional maturity in financial management processes and redesigned budget and planning processes in anticipation of a budget model redesign. Prior to joining Deloitte, Gia supported operations at an early-stage digital health start-up and served as an administrative assistant at a public university.

Education

B.S., University of Michigan

Sample of Relevant Experience

Student Success; Massachusetts Department of Higher Education: Gia led efforts to assess maturity of the student success data ecosystem at 24 community colleges and public universities in order to prepare for implementation of the framework for support services for student success. The assessment resulted in five recommendations for each individual campus to enhance data maturity along with four recommendations for the Department of Higher Ed to support the data ecosystem at each campus, which lead to more equitable student outcomes.

Strategy and Operational Assessment; University of New Mexico Health and Health Sciences: Gia contributed to the development of the current state assessment, which served as a baseline understanding for the strengths, challenges, opportunities, and barriers that UNM perceives today. This assessment included benchmarking UNM against ten peer academic health centres to understand how UNM compares in metrics such as in-state resident retention, patient satisfaction, and quality of care. She analyzed internal and external data to identify trends in healthcare needs for the state, and these analyses culminated in six strategic focus areas that guided UNM's strategic plan development.

Operational and Change Assessment; Large State Research Institution: Gia supported an assessment of a university's financial function and determined change readiness for a budget model redesign. She identified ten recommendations to enhance the maturity of the finance function and prepare for budget model redesign, and as a follow-up project, supported the development of budget tools and templates and redesigned the budget process. This ultimately led to a 25% reduction in budget development time and support standardization and financial literacy for over 100 budget officers.



Ashton Braddock, Project Consultant

Ashton is a Human Capital Consultant in Deloitte's Higher Education practice. She holds both PhD and Master's in Higher Education Administration and has 7 years of experience working for or with colleges and universities. Her work in higher education has largely revolved around supporting initiatives for higher education System executives, including implementing an institutional free college program, supporting strategic planning, and creating spaces for collaboration and visionary thinking for university leadership. Ashton is skilled in process improvement, change management and communications, developing and delivering training, and conducting assessments. She is passionate about student success, higher education access, workforce development, and improving transition experiences for students and employees.

Education

Ph.D., University of Tennessee
M.A., Johnson University
M.E., University of Arkansas
B.A., Mississippi State University

Sample of Relevant Experience

Free College Program Implementation; University of Tennessee System: Ashton led the design, implementation, and management of an institutional free college program across five campuses at a university system, which included working with executive leadership of the Tennessee Promise to align the program models. Activities included developing all financial aid and eligibility scholarship policies and procedures, facilitating marketing efforts that resulted in 8,000 applications, and managing program components and eligibility for 2,500 participants and 1,400 volunteer mentors. As the program was a top strategic priority for the System, Ashton regularly reported on the program to System executives and the Board of Trustees.

Free College Program Analysis; University of Tennessee System: Separately from her implementation of the free college program, Ashton also qualitatively evaluated the experiences of students participating in the program for her dissertation for her PhD in Higher Education Administration. In addition to doing extensive research on free college programs across the country and evaluating individual program components' success factors, she also developed an understanding of how students participating in the program perceived their experiences.

Organizational Transformation; University of Kentucky: Ashton supported the implementation of an organizational transformation through change management and communications efforts. This included assisting in developing a current state assessment through focus groups and supporting the redesign of the organization's business processes and structure. Ashton solely developed the strategy for managing the change with stakeholders, as well as drove the development and implementation of communication and training delivery.

Subject Matter Advisors



Evelyn C. Galletti, SMA: Finance and Budget

Evelyn helps institutions design and execute technology-enabled service delivery transformation initiatives to meet and advance their missions. Her focus is on administrative modernization, financial management, and budget model redesign.

Prior to Deloitte, Evelyn worked in FP&A at Vanderbilt, reporting to the CFO, during which she supported the institution in spinning off its medical center, implementing Oracle Cloud for Finance and HCM, shifting to GAAP accounting and a new budget model for internal reporting, and also served as budget officer to the COO. Evelyn is certified in Workday Adaptive Planning. Before transitioning to Higher Education, Evelyn's focus was in leading multinationals through the strategy, design, and execution of global Shared Services and Outsourcing projects across multiple functional areas. Evelyn draws on these service delivery transformation experiences in her work with higher ed institutions.

In her spare time, Evelyn serves on the Board of Directors for Nashville Ballet.

Education

M.B.A., NYU Stern School of Business
B.A., University of South Carolina Honors College

Sample of Relevant Experience

Financial Shared Services (FSS) Maturity Review; Princeton University: Led an internal review of the FSS organization to 1) determine if the original goals of the program had been realized and 2) explore how FSS could continue to be successful and add value to Princeton. The project included 45+ stakeholder interviews and focus groups, benchmarking financial transactions against seven peer institutions, and conducting a service delivery maturity assessment. To extend its reach and impact, Deloitte left Princeton with three tools: a series of shared services straw models, capacity model to trigger hiring needs, and a menu of opportunities prioritized over a three-year period to move towards leading practice.

Budget Transformation; Georgia Tech: Prepared and delivered a current state assessment, which illustrated opportunities to improve the Institute's budget maturity. Worked closely with leadership to identify five critical areas of the budget model for designing initial budget allocation scenarios. Complemented budget model levers analysis with administrative benchmarking to assess health of functions whose operating expense might be allocated across units. Created a financial modeling tool for Georgia Tech that brings together all the budget model recommendations and allows leadership to see the total financial impact.

Financial Management Review; Michigan State University: Assessed the current state of the Finance function's maturity across seven different processes, including strengths and challenges. Facilitated a customer satisfaction survey across 735 faculty and staff in support of the current state assessment. Conducted a peer benchmarking analysis of MSU's Finance function against six Big Ten institutions in order to ascertain leading practices. Conducted a budget model readiness assessment in order to define how well-equipped MSU is to redesign its budget model. Compiled a menu of opportunities to increase the maturity of MSU Finance and enable the institution to realize the full benefit of future transformations



Chintan Shah, SMA: Analytics

Chintan has led data and analytics modernization for public service organizations for over fourteen years. He enables higher education institutions to become insight-driven organizations by prioritizing data stewardship, cross-business collaboration, and sustainable analytics growth. Chintan brings a deep understanding of higher education enrollment management to lead multidisciplinary teams of functional area experts, data scientists, DevOps engineers, and visualization developers to meet organizations' needs. He is currently focused on applying data and analytics innovations with cross-industry experience to improve enrollment management, financial aid awarding, as well as student success and experience.

Education

M.Eng., Rensselaer Polytechnic Institute

B.S.E., Rensselaer Polytechnic Institute

Sample of Relevant Experience

Enrollment Analytics; Big Ten R1 Public University: Led the development of a bespoke enrollment analytics solution to help the university identify admissions and financial aid trends on key enrollment indicators to better understand the progression of the admissions lifecycle. The solution enabled end-users, such as recruiters and enrollment directors, to better understand their key geographic, demographic, and academic student profiles to better craft their strategic and operational plans. In the first year of utilizing the analytical models, the university benefited from an over 20% increase in out-of-state student enrollment and a \$5M increase in net tuition revenue.

Data Strategy Assessment; ACC R1 Public University: Conducted a comprehensive data strategy assessment for the university as it sought to evaluate the management of its vast amount of data and how it is delivered to its constituents. Beyond common areas of analysis (Student, Finance, etc.), the data management and services delivery (DMSD) initiative focused on the initial use case of sustainable management and analysis of the university's facilities' "big data" and how it relates across systems to create meaningful strategic, operational, academic, and research insights. Identified leading practices across enterprise-wide analytics and developed a roadmap to establish a future state data management design and delivery as well as a cost model and resource plan to understand what will be needed to implement the ideal future state.

Executive Analytics Dashboards; Top 10 Largest University System: Advised on the development of 15 executive PowerBI dashboards to aid the decision-making process for Executive Leadership of the Board of Regents for one of the largest university systems in the national that includes more than 20 public institutions of higher learning, serving more than 300,000 students. Delivered 16 future state recommendations and a governance playbook to form the foundation for a longer-term analytics strategy across the university system. The dashboards source data from seven functional areas (Academic, Financial Aid, HR, Facilities, Finance, and Capital Projects) and provide insights into mission-critical metrics to help leadership meet fiduciary, programmatic, and social responsibilities. The resulting recommendations, integrations, dashboards, and future state roadmaps will provide a path to inform the system's progress towards its strategic goals. The improvements will enable insights; increase transparency and collaboration; build system and campus capacity to better understand member institution data; and more effectively serve students, staff, faculty, and leadership.



Christine Robovsky, SMA: Compensation

Christine Robovsky is a Specialist Leader in Deloitte Consulting LLP's Compensation Strategies practice. Christine has twenty years of consulting experience advising human resource leaders, senior management executives, and Compensation Committees in a variety of industries, with an emphasis on the government and non-profit sectors, on executive and broad-based employee compensation issues. Christine's work as a compensation consultant includes analyzing, designing and implementing a wide range of compensation programs, including salary, incentive and other pay for performance programs. This also includes the policies, guidelines and procedures used to administer these programs. She has also worked with organizations in the public and private sectors to review and design strategic job architecture systems that enable the efficient implementation and strategic use of human capital management technology solutions and a wide range of human capital programs.

Education

M.A., University of Minnesota
B.A., University of Northern Iowa

Sample of Relevant Experience

Compensation Analysis; State Government: Assessed identified labor market compensation data for 105 key workforce roles covering base pay, bonus across all functional areas and all levels (highly populated jobs). Developed a model in Excel that allowed the state to estimate the cost of implementing market-based salary adjustments for a target set of delivery roles that represented 1/3 of the positions benchmarked as part of the compensation study. Showed how the salary adjustments change the comparison to market on an individual position basis and the estimated cost of these increases across current employees and vacancies needing filling.

Compensation Studies; State Government: Analyzed recruitment and retention metrics and trends from recent years to objectively and quantifiably identify positions which have had recruitment and retention challenges. Benchmarked the compensation of 400 classified positions with recruitment and retention challenges covering 35,000 employees and benchmarked the compensation of 50 agency head positions using market data illustrating organizations similar to those with which the State competes for talent. Developed an approach for distributing funding for salary increases for Commonwealth classified employees using the results of the recruitment, retention, and compensation benchmark analyses.



Dante Vasquez, SMA: Financial Analytics

Dante is a Manager in Deloitte's GPS Finance & Enterprise Performance offering with 12 years of experience advising the public sector and social impact organizations on a breadth of strategic, operational, and finance issues. He has focused on Higher Education since 2018 with experience in financial assessments, business process redesign, and project management.

Education

M.A., University of Michigan
M.B.A., University of Michigan
B.A., University of Michigan

Sample of Relevant Experience

Enrollment and Financial Scenario Modelling; Public Regional: Dante led the creation of an enrollment and financial scenario modelling tool used to evaluate future-state growth scenarios and their impact on enrollment size, faculty and staff levels, operational costs, and overall financial stability and sustainability.

Budget System Planning and Assessment; Private R1 University: Dante led the assessment of current budget and planning process in relation to the annual operating and capital five-year planning model and quarterly financial projection process. He documented current pain points and identified business requirements for a single budget software solution that would be leveraged by all divisions and replace the current spreadsheet tools. Dante recommended opportunities to standardize processes across divisions, administrative units, and research centers. He created a vendor evaluation framework, facilitated vendor demonstrations, and detailed an implementation plan.

Financial Management and Budget Model Transformation Readiness Assessment; Public Research University: Dante led a financial management assessment reviewing finance administrative services under the direct supervision of the CFO, including Controller, Contract and Grant Administration, Treasury and Financial Management, Risk Management and Insurance, and Financial Planning and Budget functions. He assessed current state capabilities by analysing business practices/processes, technology, data, and organizational structures. Dante identified functional gaps and opportunities to advance toward leading practice in anticipation of a budget model transformation.



Andrea Mazzocco, SMA: Workforce Development

Andrea is a Manager in Deloitte's Government and Public Services Human Capital Consulting practice. She has over eight years of experience delivering people-related services such as workforce development and training, workforce diversity, equity, and inclusion (DEI), educational equity, Future of Work, employee engagement strategies, and more. She serves as the Workforce DEI Leader for Deloitte's higher education, state and local government, and non-profit clients and is a leader in Deloitte's Workforce Development Ecosystems practice. She is also a certified Future of Work Institute™ facilitator.

Education

M.B.A., The University of Chicago Booth School of Business
M.S., Wake Forest University
B.A., The University of Akon

Sample of Relevant Experience

Workforce Innovation & Opportunity Act State Planning, *New Mexico Workforce Development Solutions*:

Andrea is leading the planning process for New Mexico's WIOA State Plan, which defines the state's vision, goals, and strategies for workforce development. She is facilitating a series of interactive workshops with partners across the workforce system, including government, state and local workforce development board members, education and training providers, non-profits, and private sector employers to gather inputs for the plan.

Racial Equity Strategic Planning; *Massachusetts Department of Higher Education*:

Andrea conducted an environmental scan of racial equity efforts across the Commonwealth's public higher education system. She led the development of a 10-year Commonwealth-wide Strategic Plan that aimed to address racial equity across the system at all 28 public institutions. Andrea developed a Marketing Plan to build awareness of the Strategic Plan across institutions, the new Governor's administration, legislators, and the general public.

Strategic Planning; *Northwestern University*:

Andrea served as an advisor for a current state assessment of the Northwestern Alumni Association's (NAA's) strengths and opportunity areas as it relates to their ability to cultivate an inclusive community for University alumni. She facilitated interviews with representatives from NAA's peer institutions and with University stakeholders to gain nuanced insights into the NAA's role in building a more inclusive environment. Andrea advised on the creation of a DEI Implementation Plan and Training Plan to drive the NAA's work in this space for the next three years.

Strategic Planning; *City of Minneapolis*:

Andrea led the engagement for the City of Minneapolis which explored DEI-related strengths and challenges as they related to the City's workforce. The engagement aimed to create a Strategic Plan that would better enable the City to become an Employer of Choice and to improve their ability to attract and retain a diverse, high-performing workforce. Andrea conducted a DEI current state assessment on the City's workforce and organizational culture, facilitated DEI Analytics working sessions to support the City in building their DEI Analytics capabilities, and developed Strategic Plan and Implementation Roadmap that detailed the City's Workforce DEI focus areas and activities for the next 2-3 years.

Budget/ Cost

Deloitte will provide the services outlined herein on a fixed-fee basis, with fees fixed at **\$955,000**. The fixed fee assumes that the services can be delivered within an approximately ten-month project time from the commencement of the engagement. This fee is based on the nature and scope of the work, the expected team resource requirements, and the anticipated duration and scope of the project. This fee is a fully burdened rate that includes our compensation, research expenses, normal travel costs, and other necessary expenditures related to the evaluation and report production as outlined in the approach above. Changes in the anticipated scope or timeline will require evaluation via change control.

This fee also takes into account several project assumptions for support from MACC to allow for timely project flow and progress:

- MACC and its associated staff designated for roles on this project will be available as needed to support the project scope, purpose, objectives, approach, and activities.
- MACC will provide access to project participants, to meet the proposed project timeline and to address any reasonable and necessary follow-up inquiries during the project.
- Our team will be given timely access to current state data and documentation in electronic format where feasible to provide ease of use and manipulation for analysis (e.g., Excel rather than PDF).
- The Deloitte team will rely on data provided by MACC and/or its constituent organizations when possible. Deloitte does not assume any responsibility for the accuracy of the data provided to the project team.
- MACC will allow for the provision of necessary data, with a data refresh frequency required to meet the business needs.
- MACC will provide a data dictionary and relevant metadata, when available.
- MACC project leadership will review and approve the use of any external data sources (public data sets, benchmarking information, third-party data, etc.) utilized as part of this project.
- MACC project leadership understands that any projected outcomes developed as part of this project are based on existing historical data and agreed-upon methodologies and assumptions and are not intended to, nor cannot, predict the future and should not be construed as such.
- MACC will not provide Deloitte with access to any Personally Identifiable Information ("PII") or other information it considers sensitive or highly confidential unless deemed necessary for this effort. MACC will immediately inform Deloitte in writing if such access is required or if MACC becomes aware that PII or other sensitive or confidential information has been disclosed to Deloitte, inadvertently or otherwise.
- MACC project leadership will review and approve the methodologies used by the Deloitte team to develop the analysis described in this document. This will include any assumptions and limitations documented by the Deloitte team.
- Deliverables shall be deemed accepted by MACC if not rejected, in writing, within five (5) business days of submission.
- MACC will make all decisions resulting from analysis.
- This proposal is submitted with the understanding that the services will be authorized via a mutually agreeable Statement of Work and contract. We have included our General Business Terms and Conditions as a basis for such a contract.
- Deloitte will not be auditing any financial statement or providing any attestation services.
- The Deloitte team will conduct most, if not all, work and stakeholder engagement remotely. MACC and campus stakeholders will be able to participate in interviews and meetings virtually via Zoom or similar technology.
- If awarded the work, we will work with MACC leadership to determine a cadence and basis of invoices that will be mutually agreeable.

General Business Terms

1. Services. The services provided (the “Services”) by Deloitte Consulting LLP (“Deloitte Consulting”) under the engagement letter to which these terms are attached (the “Engagement Letter”) may include advice and recommendations, but Deloitte Consulting will not make any decisions on behalf of Client in connection with the implementation of such advice and recommendations. For purposes of these terms and the Engagement Letter, “Client” shall mean the entity to which the Engagement Letter is addressed.

2. Payment of Invoices. Client will compensate Deloitte Consulting under the terms of the Engagement Letter for the Services performed and expenses incurred, through the term or effective date of termination of this engagement. Deloitte Consulting’s invoices are due upon receipt. If payment is not received within thirty (30) days of receipt of an invoice (i) such invoice shall accrue a late charge equal to the lesser of (A) 1½% per month or (B) the highest rate allowable by law, in each case compounded monthly to the extent allowable by law, and (ii) Deloitte Consulting may also suspend or terminate the Services. Client shall be responsible for any taxes imposed on the Services or on this engagement, other than taxes imposed by employment withholding for Deloitte Consulting’s personnel or on Deloitte Consulting’s income or property.

3. Term. Unless terminated sooner as set forth below, this engagement shall terminate upon the completion of the Services. Either party may terminate this engagement, with or without cause, by giving thirty (30) days prior written notice to the other party. In the event of a termination for cause, the breaching party shall have the right to cure the breach within the notice period. Deloitte Consulting may terminate this engagement or performance of any part of the Services upon written notice to Client if Deloitte Consulting determines that the performance of any part of the Services would be in conflict with law, or independence or professional rules.

4. Deliverables.

a) For purposes of these terms (i) “Technology” means works of authorship, materials, information and other intellectual property; (ii) “Deloitte Consulting Technology” means all Technology created prior to or independently of the performance of the Services, or created by Deloitte Consulting or its subcontractors as a tool for their use in performing the Services, plus any modifications or enhancements thereto and derivative works based thereon; and (iii) “Deliverables” means all Technology that Deloitte Consulting or its subcontractors create for delivery to Client as a result of the Services.

b) Upon full payment to Deloitte Consulting hereunder, and subject to the terms and conditions contained herein, Deloitte Consulting hereby (i) assigns to Client all rights in and to the Deliverables, except to the extent they include any Deloitte Consulting Technology; and (ii) grants to Client the right to use, for Client’s internal business purposes, any Deloitte Consulting Technology included in the Deliverables in connection with its use of the Deliverables. Deloitte Consulting may disclose to any third parties copies of Deliverables that do not contain any Client-identifiable information. Except for the foregoing license grant, Deloitte Consulting or its licensors retain all rights in and to all Deloitte Consulting Technology.

c) To the extent any Deloitte Consulting Technology provided to Client hereunder constitutes inventory within the meaning of section 471 of the Internal Revenue Code, such Deloitte Consulting Technology is licensed to Client by Deloitte Consulting as agent for its product company subsidiary on the terms and conditions contained herein. The rights granted in Section 4(b) do not apply to any Technology (including any modifications or enhancements thereto or derivative works based thereon) that is subject to a separate license agreement between Client and any third party (including, Deloitte Consulting’s affiliates).

5. Limitation on Warranties. THIS IS A SERVICES ENGAGEMENT. DELOITTE CONSULTING WARRANTS THAT IT SHALL PERFORM THE SERVICES IN GOOD FAITH AND IN A PROFESSIONAL MANNER. DELOITTE CONSULTING

DISCLAIMS ALL OTHER WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING, WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

6. Limitation on Damages and Indemnification.

a) Each party, its subsidiaries, subcontractors, and their respective personnel shall not be liable for any claims, liabilities, or expenses relating to this engagement ("Claims") for an aggregate amount in excess of (i) in the case of Deloitte Consulting, the fees paid by Client to Deloitte Consulting pursuant to this engagement, or (ii) in the case of Client, the fees paid and payable by Client to Deloitte Consulting pursuant to this engagement, except to the extent resulting from their recklessness, bad faith or intentional misconduct. In no event shall either party, its subsidiaries, subcontractors, or their respective personnel be liable for any loss of use, data, goodwill, revenues or profits (whether or not deemed to constitute a direct Claim), or any consequential, special, indirect, incidental, punitive or exemplary loss, damage, or expense relating to this engagement. The provisions of this Section 6(a) shall not apply to any Claim for which one party has an express obligation to indemnify the other or to any Claim for breach of Section 4. In circumstances where any limitation on damages or indemnification provision hereunder is unavailable, the aggregate liability of each party, its subsidiaries, subcontractors, and their respective personnel for any Claim shall not exceed an amount that is proportional to the relative fault that their conduct bears to all other conduct giving rise to such Claim.

b) Deloitte Consulting shall indemnify, defend and hold harmless Client and its personnel from all Claims attributable to claims of third parties solely for bodily injury, death or damage to real or tangible personal property, to the extent directly and proximately caused by the negligence or intentional misconduct of Deloitte Consulting while engaged in the performance of the Services; provided, however, that if there also is fault on the part of any entity or individual indemnified hereunder or any entity or individual acting on Client's behalf, the foregoing indemnification shall be on a comparative fault basis.

c) Client shall indemnify, defend and hold harmless Deloitte Consulting, its subsidiaries, subcontractors and their respective personnel from all Claims attributable to claims of third parties solely for bodily injury, death or damage to real or tangible personal property to the extent directly and proximately caused by the negligence or intentional misconduct of Client while Deloitte Consulting is engaged in the performance of the Services; provided, however, that if there also is fault on the part of any entity or individual indemnified hereunder or any entity or individual acting on Deloitte Consulting's or any subcontractor's behalf, the foregoing indemnification shall be on a comparative fault basis.

d) As a condition to the indemnity obligations contained herein, the indemnified party shall provide the indemnifying party with prompt notice of any Claim for which indemnification shall be sought hereunder and shall cooperate in all reasonable respects with the indemnifying party in connection with any such Claim. The indemnifying party shall be entitled to control the handling of any such Claim and to defend or settle any such Claim, in its sole discretion, with counsel of its own choosing.

7. Client Responsibilities. Client shall cooperate with Deloitte Consulting hereunder, including, providing Deloitte Consulting with reasonable facilities and timely access to data, information and personnel of Client. With respect to the data and information provided by Client to Deloitte Consulting or its subcontractors for the performance of the Services, Client shall have the rights required to provide such data and information, and shall do so only in accordance with applicable law and with any procedures agreed upon in writing. Client shall be solely responsible for, among other things (a) the performance of its personnel and agents; (b) the accuracy and completeness of all data and information provided to Deloitte Consulting for purposes of the performance of the Services; (c) making all management decisions, performing all management functions and assuming all management responsibilities; (d) designating a competent management member to oversee the Services; (e) evaluating the adequacy and results of the Services; and (f) establishing and maintaining internal controls, including monitoring ongoing activities. Deloitte Consulting's performance is dependent upon the timely and

effective satisfaction of Client's responsibilities hereunder and timely decisions and approvals of Client in connection with the Services. Deloitte Consulting shall be entitled to rely on all decisions and approvals of Client.

8. Force Majeure. Neither party shall be liable for any delays or non-performance directly or indirectly resulting from circumstances or causes beyond its reasonable control, including, fire, epidemic or other casualty, act of God, strike or labor dispute, war or other violence, or any law, order or requirement of any governmental agency or authority.

9. Limitation on Actions. No action, regardless of form, relating to this engagement, may be brought by either party more than one year after the cause of action has accrued, except that an action for non-payment may be brought not later than one year following the due date of the last payment owing to the party bringing such action.

10. Independent Contractor. Each party is an independent contractor and neither party is, nor shall be considered to be, nor shall purport to act as, the other's agent, partner, fiduciary, joint venturer, or representative.

11. Confidentiality and Internal Use.

a) To the extent that, in connection with this engagement, either party (each, the "receiving party") comes into possession of any confidential information of the other (the "disclosing party"), it will not disclose such information to any third party without the disclosing party's consent, using at least the same degree of care as it employs in maintaining in confidence its own confidential information of a similar nature, but in no event less than a reasonable degree of care. The disclosing party hereby consents to the receiving party disclosing such information (i) as expressly set forth in the Engagement Letter, (ii) to contractors providing administrative, infrastructure and other support services to the receiving party and subcontractors providing services in connection with the Engagement Letter, in each case, whether located within or outside of the United States, provided that such contractors and subcontractors have agreed to be bound by confidentiality obligations similar to those in this Section 11(a), (iii) as may be required by law or regulation, or to respond to governmental inquires, or in accordance with applicable professional standards or rules, or in connection with litigation pertaining hereto, or (iv) to the extent such information (A) is or becomes publicly available other than as the result of a disclosure in breach hereof, (B) becomes available to the receiving party on a nonconfidential basis from a source that the receiving party believes is not prohibited from disclosing such information to the receiving party, (C) is already known by the receiving party without any obligation of confidentiality with respect thereto, or (D) is developed by the receiving party independently of any disclosures made to the receiving party hereunder. Nothing in this Section 11(a) shall alter Client's obligations under Section 11(b). Deloitte Consulting may, however, use and disclose any knowledge and ideas acquired in connection with the Services to the extent they are retained in the unaided memory of its personnel.

b) All Services and Deliverables shall be solely for Client's benefit and are not intended to be relied upon by any person or entity other than Client. Client shall not disclose the Services or Deliverables or refer to the Services or Deliverable in any communication, to any person or entity other than Client except (i) as specifically set forth in the Engagement Letter, or (ii) to Client's contractors solely for the purpose of their providing services to Client, provided that such contractors comply with the restrictions on disclosure set forth in this sentence. Client shall indemnify and hold harmless Deloitte Consulting, its subsidiaries, subcontractors and their respective personnel from all Claims attributable to claims of third parties relating to Client's use or disclosure of the Services or Deliverables.

c) Client agrees that any data provided by Client under the Engagement Letter may be used by Deloitte Consulting in connection with the Services and any other services offered by Deloitte Consulting. Client further agrees that any such data may be disclosed by Deloitte Consulting to third parties in connection with such services, provided that such data does not contain any Client-identifiable information.

12. Survival and Interpretation. All provisions which are intended by their nature to survive performance of the Services shall survive such performance, or the expiration or termination of this engagement. In the event of any conflict or ambiguity between these terms and the Engagement Letter, these terms shall control. **Each of the provisions of these terms shall apply to the fullest extent of the law, whether in contract, statute, tort (such as *negligence*), or otherwise, notwithstanding the failure of the essential purpose of any remedy.** Any references herein to the term “including” shall be deemed to be followed by “without limitation.”

13. Assignment and Subcontracting. Except as provided below, neither party may assign, any of its rights or obligations (including, interests or claims) relating to the Engagement Letter or the Services without the prior written consent of the other party. Client hereby consents to Deloitte Consulting assigning or subcontracting any portion of the Services to any affiliate or related entity, whether located within or outside the United States. Services performed hereunder by Deloitte Consulting’s subcontractors shall be invoiced as professional fees on the same basis as Services performed by Deloitte Consulting’s personnel, unless otherwise agreed.

14. Non-exclusivity. Deloitte Consulting may (i) provide any services to any person or entity, and (ii) develop for itself, or for others, any materials or processes including those that may be similar to those produced as a result of the Services, provided that, Deloitte Consulting complies with its obligations of confidentiality set forth hereunder.

15. Non-solicitation. During the term of this engagement and for a period of one (1) year thereafter, each party agrees that its personnel (in their capacity as such) who had substantive contact with personnel of the other party in the course of this engagement shall not, without the other party’s consent, directly or indirectly employ, solicit, engage or retain the services of such personnel of the other party. In the event a party breaches this provision, the breaching party shall be liable to the aggrieved party for an amount equal to thirty percent (30%) of the annual base compensation of the relevant personnel in his/her new position. Although such payment shall be the aggrieved party’s exclusive means of monetary recovery from the breaching party for breach of this provision, the aggrieved party shall be entitled to seek injunctive or other equitable relief. This provision shall not restrict the right of either party to solicit or recruit generally in the media.

16. Waiver of Jury Trial. THE PARTIES HEREBY IRREVOCABLY WAIVE, TO THE FULLEST EXTENT PERMITTED BY LAW, ALL RIGHTS TO TRIAL BY JURY IN ANY ACTION, PROCEEDING OR COUNTERCLAIM RELATING TO THIS ENGAGEMENT.

17. Entire Agreement, Amendment, and Notices. These terms, and the Engagement Letter, including attachments, constitute the entire agreement between the parties with respect to this engagement, supersede all other oral and written representations, understandings or agreements relating to this engagement, and may not be amended except by written agreement signed by the parties. All notices hereunder shall be (i) in writing, (ii) delivered to the representatives of the parties at the addresses set forth in the Engagement Letter, unless changed by either party by notice to the other party, and (iii) effective upon receipt.

18. Governing Law, Jurisdiction and Venue, and Severability. These terms, the Engagement Letter, including attachments, and all matters relating to this engagement, shall be governed by, and construed in accordance with, the laws of the State of New York (without giving effect to the choice of law principles thereof). Any action based on or arising out of this engagement or the Services shall be brought and maintained exclusively in any state or federal court, in each case located in New York County, the State of New York. Each of the parties hereby expressly and irrevocably submits to the jurisdiction of such courts for the purposes of any such action and expressly and irrevocably waives, to the fullest extent permitted by law, any objection which it may have or hereafter may have to the laying of venue of any such action brought in any such court and any claim that any such action has been brought in an inconvenient forum. If any provision of these terms or the Engagement Letter is unenforceable, such provision shall not affect the other provisions, but such unenforceable provision shall be deemed modified to the extent necessary to render it enforceable, preserving to the fullest extent permissible the intent of the parties set forth herein.

19. Approval of Deliverables. Client shall approve each Deliverable that conforms in all material respects to the requirements therefor set forth in the Engagement Letter. Approval of a Deliverable shall be deemed given if Client has not provided Deloitte Consulting with written notice of such approval or with written notice that a Deliverable does not conform with the foregoing within fifteen (15) days of delivery.

20. Consent to Limited Use of Client's Name. In connection with the performance of any benchmarking Services, Client consents to Deloitte Consulting listing Client's name, under the following conditions:

a) Client's name will always be listed among the other clients of Deloitte Consulting's benchmarking practice and only in Deloitte Consulting's benchmarking client lists, publications, news releases, articles, websites, promotional materials, direct mail solicitations, brochures, and other forms of advertising in connection with benchmarking services offered by Deloitte Consulting;

b) No such use of Client's name will state that Client endorses or recommends Deloitte Consulting or its benchmarking services; and

c) In each instance Deloitte Consulting will list Client alphabetically in a manner no more or less prominent than any of its other clients.



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