Welcome to Today’s Webinar

June 24, 2020

How Students are Feeling & How Institutions are Planning

Moderator: Nick Santilli, Senior Director of Learning Strategy, SCUP
Presenter: Elliot Felix, Founder and Chief Executive Officer, brightspot strategy
Agenda

1. Introduction and audience poll
2. Student Experience Snapshot™ findings
3. Questions and Answers
4. Campus reopening discussions findings
5. Questions and Answers
6. Recommendations
7. Questions and Answers
About brightspot

We transform the higher education experience with smart strategy that connects people, programs, and places – on campus and online.

Together with our clients, we increase student success, improve research support, and enable staff productivity while making institutions more efficient and effective.

Our practical process combines quantitative and qualitative data, uses a participatory approach so people shape their own future, and enables continuous learning by applying design thinking to prototype, pilot, and scale up ideas.
Our Services and Clients

We’ve partnered with 91 colleges and universities to understand and transform their programs, places, and people with research, visioning, and strategy.

We do this offering the following services: Research and Engagement, Visioning and Strategic Planning, Space Programming and Planning, Functional Master Planning, Service Design, Operational Planning, Organizational Design, and Change Management.

Recent results include 93% student satisfaction, 89% staff engagement, 88% faculty satisfaction, 84% reduced response times, 30% reduced cost.
Audience Poll

As you plan for the fall, what do you see as the greatest opportunity?

1. Create more healthy, sustainable environments
2. Advance online learning and reduce classroom space
3. Enable active learning solving real-world problems
4. Support remote work and reduce office space
5. Close equity gaps by race and background
6. Increase agility of teams and processes
7. Increase impact of research to solve societal problems
8. Strengthen ties to local communities
PART I: STUDENT EXPERIENCE SNAPSHOT
About the Student Experience Snapshot

The Snapshot is a short online survey that students complete in an average of 5 minutes to rate their experience with Academics, Community and Culture, Student Services, Technology, and Facilities. These experience ratings are coupled with two overall measures: their sense of personal growth and their overall satisfaction with their college or university.

For this survey, we added specific questions about how the COVID-19 pandemic affected students, how they think their institutions are handling the crisis, their plans for the fall, and their take on the value of their education. These questions took an additional 5 minutes to complete.
Snapshot Demographics

brightspot worked with Qualtrics to collect valid response data from April 20 to April 26, 2020, from 502 students currently pursuing bachelor’s degrees in the United States.

Our respondents approximated national demographics in terms of gender, age, geographic region, race, institution type, and key attributes, including first-gen status, low-income status, students with disabilities, part-time students, and veteran students.

Refer to Appendix B of the whitepaper.
Our findings are structured so that colleges and universities can make informed decisions about the fall, identify considerations as they redesign their institutions in response to the pandemic, and use our recommendations to act on the findings.

This deck provides an overview answering the six questions (to the right) that we focus our findings on. For additional resources and detail, we encourage you to read the full whitepaper. The whitepaper also includes a detailed finding review for survey enthusiasts and appendices on methodology and demographics.

Our findings answer these and other questions:

A. Will they come back in the fall and if not, what will they do instead?
B. How satisfied are students with their experience?
C. What’s working and what isn’t about their experience?
D. How do they think their institutions are handling things?
E. Will there be a backlash against online courses and student services?
F. Do they still think their education is worth the cost?
Will students come back in the fall?

While there has been great concern that students may not come back in the fall, 81% are planning to return, consistent with typical retention at four-year schools and with an increase in plans to study online, from 16% currently to 20%.

- Returning students felt they are being challenged academically, gaining confidence, developing relationships with professors, belong to a group, and have a place of their own.
- Adult learner retention is lower at 67% vs. 88% for students 18-24 years old.
- Lack of community appears to be a big driver for students planning to transfer.
How satisfied are students overall?

Students are satisfied with their experience, but this varies by group and isn’t a great predictor of whether they will come back in the fall.

- Overall, 75% students were “completely” or “mostly” or “somewhat” satisfied – a slight decrease from the 78% in our 2018 Snapshot.

- There is little variation in satisfaction for first-generation students, low-income students, students 25 or older, but students with disabilities are more satisfied, and part-time students are less satisfied.

- With only 63% satisfied, Black / African American students are less satisfied than other groups.
What’s working and what isn’t for students?

Academic programs are paramount and students are happy with them, but they are not happy with community and campus culture.

- Community had the least positive ratings (65% positive) but the second-highest priority (after academic programs).
- Issues include: belonging to a group (67% positive ratings), participating in student activities (60%), connecting with mentors (56%), and playing leadership roles (56%).
- Students are also unhappy with their institution’s fostering of community and belonging during the crisis (53% satisfaction).
What is the biggest challenge for students?

The challenges of COVID-19 vary by student segment, but separations from friends and pivoting to online courses have been the biggest challenges for students overall.

- Students 18-24 and full-time students have found the transition more challenging than adult learners and those studying part-time.
- Black / African American students are the most satisfied with shifting support services online (65% vs. 54% overall).
- Separation from friends was less of an issue for students 25 or older (24% found it “extremely challenging” vs. 34% for students overall).
How well were things handled?

Students’ perceptions of how their colleges and universities responded relate to their challenges, with communication getting the highest marks.

- Low-income students were less satisfied with communication (44% vs. 69% overall)
- Part-time students and those over 25 are both more satisfied with handling the crisis.
- Only 53% of students are satisfied with their institutions creating a sense of belonging (53% satisfied), but Black / African American students were more satisfied (65%) and Hispanic / Latino students less (43%).
- Only 44% of students are satisfied with how their institution provided financial support.
Will there be a backlash against online courses?

The pivot to learning online and accessing student services online has affected students positively and negatively in equal measure.

- Concern that the current “emergency remote teaching” could dissuade students from online courses in the future may be overblown – 20% of those returning or transferring plan to enroll online (vs. 15% today).

- When asked how this shift has affected their intent to learn online in the future, 31% said more likely, 31% said less likely.

- Similarly, when asked about intent to access student services online, 28% say more likely and 28% said less likely.

<table>
<thead>
<tr>
<th></th>
<th>% Students Challenged by Online Course Shift</th>
<th>% Students More Likely to Learn Online</th>
<th>% Students Planning to Study Online in the Fall</th>
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<tbody>
<tr>
<td>Overall Average</td>
<td>50%</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>First-Generation Students</td>
<td>50%</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>Low-Income Students</td>
<td>49%</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>Part-Time Students</td>
<td>33%</td>
<td>49%</td>
<td>36%</td>
</tr>
<tr>
<td>Students 25 or Older</td>
<td>41%</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Students With Disabilities</td>
<td>42%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>Asian or Asian American</td>
<td>59%</td>
<td>20%</td>
<td>4%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>47%</td>
<td>18%</td>
<td>33%</td>
</tr>
<tr>
<td>Latino or Hispanic</td>
<td>48%</td>
<td>31%</td>
<td>15%</td>
</tr>
<tr>
<td>Two or More Races</td>
<td>60%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>White</td>
<td>51%</td>
<td>35%</td>
<td>20%</td>
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</tbody>
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1. Students reporting “Extremely challenging” or “very challenging”
2. Students responding “A lot more likely” or “More likely”
3. Of returning or transferring students (i.e., excluding deferrals, stop-outs)
Do students feel supported?

Overall, students are relatively satisfied with non-academic support services (66% positive) and academic support services (69% positive)

- Students have the most positive experiences with degree planning (79% positive), orientation (72%), developing academic skills (70%) and learning how to manage time (69%).

- Students have the least positive experience with paying bills (60% positive), financial aid advice (63%), community service programs (63%), and honors programs (65%).

- There are significant differences by race (i.e., with tutoring) and for first-gen and low-income students (i.e., with financial aid and advice).
Do students think their education is worth the cost?

The COVID-19 pandemic has roughly doubled students’ perception that their education is NOT worth the cost and this varies significantly by student segment.

- The percentage of students saying it was “definitely not worth the cost” or “probably not worth the cost” went from 15% to 27%.
- Perceptions of value declined more for students of color.
- Those who think their education is still worth it since COVID-19, rate all statements about how their institution managed the transition significantly higher than those who don’t think it’s worth it.
QUESTIONS?
PART II: REOPENING PANEL DISCUSSIONS
Reopening Panel Discussions

From May 4 to May 15, brightspot facilitated discussions among our clients about how they had adapted in the spring and how they were planning for the fall.

More than 50 leaders among 37 institutions participated in four discussions organized by role: student affairs, professional schools, libraries, and campus architects/planners.

Panel Participants:
- 18 Public Institutions and 19 Private Non-Profits
- ~50% East Coast, ~25% West Coast, ~25% Midwest
- 36 US Institutions
- 35 R1 Universities
- 21 in top 50
- 30 in top 100
Overall themes from discussions

Looking across the 37 institutions, there are common themes about remote work, decision-making, social distancing, and norms.

1. **Remote work has gone well.** Now policies, tools, and training are needed for fall.

2. **Decision-making** in the face of uncertainty and changing conditions is a challenge.

3. **Adapting spaces for social distancing** is complex and varies by type space.

4. **New norms for the new normal** will be needed since people will need to use space and technology in new ways.

*Chronicle of Higher Education Dataset on Campus Reopening plans as of June 11th (n = 935)*
Student Affairs Leaders

Student Affairs leaders have successfully pivoted in most cases to online support services and are focused on proactive communications, fostering partnerships, inclusive decision-making, and influencing without authority.

1. Online student services are working well, with leaner processes.
2. More partnerships internally and externally are on the horizon.
3. Decisions are being made quickly, but not always inclusively.
4. Feeling caught in the middle with responsibility but not control.

“We are working together – not as offices, but functions – efficiently and effectively filling gaps in communications beyond academics by checking in with students…” - VP Student Affairs

Learn more in this post.

Strategies for Adapting Online

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>EXAMPLE</th>
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<tbody>
<tr>
<td>Flip the consult</td>
<td>Send intake form with questions and links to resources in advance</td>
</tr>
<tr>
<td>Collaborative consult</td>
<td>Monitor queue for requests and have two providers join (e.g., subject + skill tutor)</td>
</tr>
<tr>
<td>Pop-up presence</td>
<td>Join first minutes of a class to promote services, “chat with us” on landing page</td>
</tr>
<tr>
<td>Proactive outreach</td>
<td>Use LMS, chatbot, etc to send short diagnostic at times of stress (e.g., exams)</td>
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Service Design Webinar - May 6th, 2020 © 2020 brightspot strategy

brightspot webinar on Online Student Services
Leaders of professional schools are looking ahead to a fall with raised expectations and are defining principles, planning for a hybrid, and looking to make the structural changes needed.

1. Defining guiding principles for the fall, especially around equity and remote activities.
2. The fall will be a hybrid (and so will everything after) and clinical programs seem to be the biggest challenge.
3. Feeling caught in the middle with responsibility but not control.
4. Want to emerge from the crisis stronger than before and make big changes.

“People are accommodating and appreciative this spring, but the bar is going to be higher for the fall semester. We can’t just replicate spring success.” - Associate Dean

MIT Sloan Activity-Based Workplace
(Workplace strategy: brightspot, Design: Stantec)
Library Leaders

Library leaders have transitioned to online access for information and services, and they are now adapting spaces and services for the fall to reduce touchpoints and enable access.

1. Online student services are working well, with leaner processes and digital collections access.
2. Leaders are concerned about equitable access to space, information, and tools.
3. Need to emphasize library’s role as part of a network of spaces given reduced capacity due to social distancing.
4. Staff roles have shifted and will continue to shift, particularly those dealing with physical books, journals, and materials.
Campus planners and architects are preparing for multiple reopening scenarios in which the “supply” of space has to be adapted to meet uncertain “demand” – and want to make short-term changes with the long term in mind.

1. Concerned that while productivity is up, nuance and critical thinking are down.
2. Unclear on how to evaluate / change projects already in the pipeline.
3. Feeling caught in the middle with responsibility but not control.
4. Want to emerge from the crisis stronger than before and make big changes in this moment.
QUESTIONS?
PART III: RECOMMENDATIONS
Understand Student Experience by Segment

Understand that there is no single “student experience” at your college or university but rather a range of them, and then combine strategies that work for all students with those tailored to certain segments.

- Segment student body into useful categories (and reference existing national personas).
- Assess your student’s experiences, with surveys, interviews, observations, focus groups, and data mining.
- Map future student journeys, for each segment considering programs, student services, technology, facilities, and community.

brightspot’s Student Experience Canvas
Maximize the Value of Campus

Use Snapshot findings to maximize the value of the campus by focusing on what students value and are missing.

- The biggest gaps: sense of belonging to a group, providing a place that feels their own, facilitating participating in groups/clubs and activities, helping them feel supported by staff and faculty, and building school spirit.

- Academic programs should help students improve their abilities to work in teams, to work on long-term projects, to solve real-world problems, and connect with mentors.

- Consider living/learning communities to foster campus community.

Facilities Rating Have Strong Relationships to Recruitment and Retention (brightspot’s 2018 Snapshot)

Correlations between student's ratings of facilities and their sense of personal growth likelihood to recommend their institution to a friend.
Focus on What’s Working Well

Focus on the aspects of student experience that are working well for students who plan to return in the fall and think their education is worth the cost.

- Returning students feel they are: challenged academically, gaining confidence, develop relationships with professors, belong to a group, have a place of their own, have school spirit, and degree planning.

- Students who think their education is worth it: talk to advisors, get financial aid advice, have a say, explore career options, use health and wellness services, develop relationships with professors, get tech support, explore emerging tech, and feel included in their classes.

Freeman et al, “Active learning increases student performance in STEM” Proceedings of the National Academy of Sciences, 2014
Prepare for the online/on-campus hybrid

Prepare for the convergence of on-campus and online worlds – classes, extracurricular activities, student services, and events will all be a hybrid – and build community online in parallel.

- Two-thirds of fully-online students enroll within 50 miles of home and universities are creating micro-campuses for online students.

- There will be students who are stuck abroad, immunocompromised, or in quarantine that need online access to courses, services, and events (and those that prefer online formats).

- Now is the time to invest in ways to foster community online increase access, flexibility and resilience.

UW Othello Storefront Micro-campus for online students (The Chronicle of Higher Education)
Make structural changes for sustainability

After 10 years of change in 10 days, colleges and universities can and should make the additional changes they need to not just survive but thrive.

- Prioritize academic programs of strength and distinction while appealing to more students.
- Organize by impact/problem, not discipline and blend learning and research while preparing for academia/industry convergence.
- Combine academic and student affairs to serve the whole student and integrate student services.
- Increase flexibility, accessibility, and resilience through online learning while curtailing facility expansion and leveraging distinctive places.

Temple University Charles Library
(Strategy: brightspot, Design: Snøhetta and Stantec)
QUESTIONS?
THANK YOU!

Elliot Felix, Founder and CEO elliott@brightspotstrategy.

To sign-up to receive brightspot’s monthly insights, visit: http://bit.ly/bspot_signup
Upcoming Events

- **June 25 | Webinar**
  COVID Conversation: Checklist of Checklists for Returning to Campus

- **July 1 | Webinar**
  *Planning in Times of Crisis and Beyond*
  Reviving Your Strategic Planning Process

- **July 1 | Coffee Chat**
  Re-Opening: Returning to the New Normal