



Innovations in College and Career Counseling



**Making Waves
Foundation**



As part of the Strategic Plan, College and Career Counseling is experimenting with several test and learn innovations

Strategic priorities

Outcomes / rationale

Test and learn innovations

1

Align MWA & CAP programs for maximum impact from 5th grade through college.

• Aligned college access and success programming will enable a **better student experience and stronger outcomes**

• Student **persona** mapping, anchored in **life milestones and experiences**

2

Refine existing MWA & CAP programs to increase efficiency, effectiveness, and impact

• Increased impact and efficiency will enable us to **serve more students** without sacrificing quality

• Self-service offering powered by **artificial intelligence** and **automation** to complement direct service offering

3

Position MWF for **sustainability and expansion**

• Orienting toward our program outcomes will position the organization for **long-term financial sustainability and success**

• Reach and accommodate more students through **technology**

4

Develop a culture of **continuous improvement** to spur, learning, growth, and innovation

• Prioritizing learning will help to **drive impact and efficiency** while also helping others to **replicate some of our success**

• **Instructive** to other MWA teams
• **Accessible** to the community as soon as AY 2021-22

In an effort to create a better experience for all students, an internal survey of Wave-Makers revealed three distinct student personas



Achievers and Underdogs ask questions like, “Can internships be done online?” or “How do I bring up my GPA?” They do their work on time, get out of their comfort zone, and weigh their options when making decisions. They see an abundance of people and opportunities to help them, which makes them feel powerful and overwhelmed. They hear things like, “You’re doing great” and “You’ve got this.” They tell themselves that “It will be worth it.”

Cautious Self-observers ask questions like, “How do I make friends?” or “How do I ask my teacher for help without bothering them?” They procrastinate, think about their dreams without acting on them, and compare themselves to others. They see how “easy” it is for other people to succeed and have friends, which makes them feel anxious, self-critical, and stuck. They hear things like, “Don’t be shy” and “You have to participate more.” They ask themselves, “Why am I like this?”

Pragmatists and Survivors ask questions like, “Am I going through depression?” or “What if I don’t have a safe family to go home to?” They are adverse to receiving help, they pick up hobbies (but drop them quickly), and avoid family conflict. They see time running out, no one to look up to, and emotional reactions from their parents, which makes them feel hopeless, unworthy, and angry. They hear things like, “Use your planner” and “Don’t be lazy.” Things they say to themselves include “I’m dumb,” “When will this end?” and “It doesn’t matter anyways.”

Our current programs reach “achievers and underdogs,” but “pragmatists and survivors” are increasingly becoming non-communicative and unreachable

Essential Question and Design Challenge

How might we create an **ecosystem of knowledge and support** that is simple, digestible, and easy to find...

...for self-directed students (**achievers and underdogs**), students who are vulnerable to discouragement (**cautious self-observers**), and students who have life priorities that compete with school (**pragmatists and survivors**)...

...without sacrificing the **high-touch approach** and **outcomes** already associated with our current program?

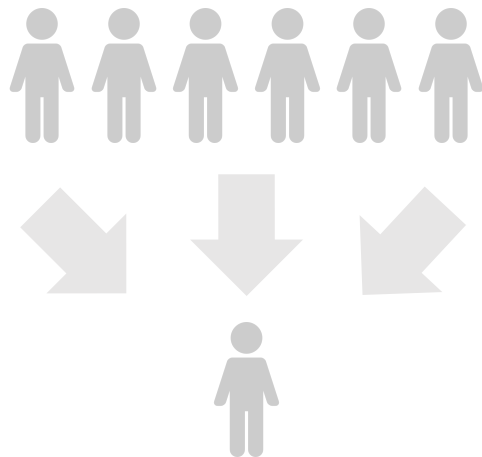
“This is a pretty solid layout of students at Making Waves Academy. The achievers are the ones that get the most praise. The ones that struggle a bit more or who are not as motivated are pushed to the side and not acknowledged.”

- Student Member of Brain and Psychology Club

College and Career Counseling is asking for a test and learn budget of \$3,500 to experiment with artificial intelligence and automation in an effort to reach and accommodate students that are not being reached now and to test a scalable platform that can guide our Contra Costa expansion

CURRENT STATE

“What we are doing now”
(direct service only)

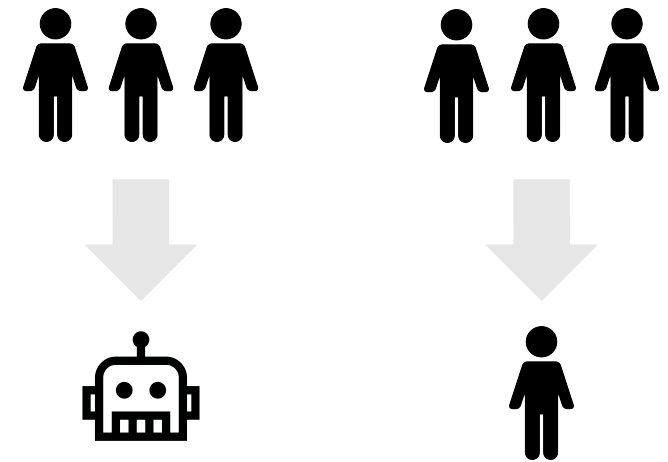


Self-directed students move at the **pace of the staff person** and high-needs students receive individualized support **when time is available**.

A self-service offering that complements our direct services can allow for more student support, when and where it's needed

FUTURE STATE

“What we want to do”
(self-service and direct service)



Self-directed students receive the **right information** at the **right time**.

More time to provide direct service support to all students where it's needed.

In order to reach our future state, we are seeking a substantive investment in technology. That said, an initial comparison of vendors was **inconclusive**.

Salesforce is an enterprise database that has a native solution for each of our social impact requirements.

Annual Licensing: \$40,000 (3yr Contract)
Integrations: \$2,000 (Optional)
Implementation: \$6,000 (One-time)
Consulting: \$115,000 (Optional)
Maintenance: +1 FTE, Salesforce Admin.

First year investment would not exceed **\$300,000** and +1 FTE as a Salesforce Administrator. (3 Year Contract Req.)

Intercom is a conversational support and knowledge base platform that would require additional software integrations.

Annual Licensing: \$18,000
Integrations: \$3,500 (Required)
Implementation: \$0
Consulting: \$0
Maintenance: \$0

First year investment would not exceed **\$21,500**.

Zen Desk is a ticketing solution and knowledge base platform that would require additional software integrations.

Annual Licensing: \$7,500
Integrations: \$3,500 (Required)
Implementation: \$0
Consulting: \$15,000 (Optional)
Maintenance: \$0

First year investment would not exceed **\$26,000**.

A test and learn approach will help us clarify the social impact requirements for this project, which will help us decide upon the solution that is best-fit for our needs.

Our test and learn approach will be modular, cyclical, and accompanied by success measures with regular cycles of reporting-out to demonstrate progress

	Current State Today	Test, Learn, Inform 8-Week Cycles	Future State 2-3 Year Deployment
Program Features			
A team of direct service staff members that provide knowledge and support through: one-on-one and small group guidance; workshops and office hours; video conferencing, emails, phone calls, and texts; lessons in Advisory, assemblies and wave meetings; and parent and family meetings. (Direct Service)	✓	✓	✓
Automated notifications through email and text to increase student and family communication during periods of time where staff members are consumed with labor-intensive activities like processing class schedules, determining academic credit standing status, and college application completion. (Direct Service with Automation)	-	+\$588	+\$588
A virtual assistant that can resolve support inquiries, ask for clarification, and redirect users to contact a staff member if needed. (Disambiguation and Escalation) (Self-Service)	-	+\$1,440	+\$1,440
A virtual assistant that can be reached through live chat, email, and text. (Omnichannel) (Self-Service)	-	+\$540	+\$540
A virtual assistant that can facilitate appointment scheduling. (Appointment Scheduling) (Self-Service)	-	+\$864	+\$864
A virtual assistant that can provide multilingual content. (Language Support) (Self-Service)	-	-	+\$0
A virtual assistant that can provide individualized support by pulling student-specific information from a database. (Data Dipping and Webhooks; requires a CRM) (Self-Service)	-	-	-
A database that allows for staff collaboration on user information, documentation, and reporting from Grade 5 to Alumni. (CRM)	-	-	-
A knowledge base that is easy to search and can be accessed by any community member. (Knowledge Base with Multilingual Support, usually bundled with a CRM*) (Self-Service)	-	-	*
Estimated Annual Cost	No Change	+\$3,500	Varies Widely
Success Measures			
% of students who have engaged via direct service and self-service, disaggregated by personas, grade levels, and subgroups	13.5%	70%	80%
% of test and learn questions that are answered - see next slide	0%	90%	

DRAFT

In addition to success measures, there are several questions that need to be answered before making a substantive future state investment

- To what degree does this technology investment align with the efforts of Information Technology and Applied Technology at Making Waves Academy, Making Waves Foundation, and CAP?
- What additional one-time or recurring costs might be associated with an investment in future state technology, such as fees for consulting, maintenance, or implementation?
- In choosing a database or CRM, what information could help us decide on whether to pursue an out-of-the-box package like ZenDesk (low-cost, little customization), Intercom (mid-range pricing) or a custom development like Salesforce (high-cost, high customization)?
- How would the responsibilities of current staff members be rearranged to align with this new direction?
- How quickly can direct service and self-service features be updated to push-out content that reflects a changing landscape in college admissions and the workforce?
- What is the estimated cost per student in the current state versus future state?
- Other questions

Key stakeholders have given early-slice feedback and input already, with room for more feedback and guidance

- Each members of the Program Core Team: collected early guidance on connection to strategic plan, particularly around scaling our college and career program
- Received guidance from Crews-Gamez and Greene (confirming personas; also guidance on responses to questionable content, including self-harm revealed to a bot)
- Received guidance from Edwards and Williams on implementation approach, capacity needed, technical requirements, and privacy requirements needed of technology solutions
- College and Career Counseling, developing and confirming personas and participating in technology demos to confirm use-cases in test-and-learn and future states
- Input and guidance from students on personas and help from a virtual assistant: ASB, Climate Justice Club, Life Hacks Club, Brain and Psychology Club, Journalism and Multimedia Club
- Input and guidance from 11th grade and 12th grade advisors on personas
- Input and guidance from vendors, including Ben Woo at Salesforce, Ross Chan at Belmar (Salesforce Consultants), DJ Slaughter at Intercom, Sam Magnus at ZenDesk, and Marlon DeAssis at HubSpot
- More input planned throughout test and learn phase

Thank you.



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