December 7, 2023

TO: THE DISTRICT BOARD OF TRUSTEES OF VALENCIA COLLEGE

FROM: DR. KATHLEEN PLINSKE
              President

RE: PORTAL REPLACEMENT - PATH EDUCATION, INC.

For more than 15 years Valencia College has used a technology product called Luminis, as the infrastructure base for an online portal the College calls Atlas. This Atlas portal serves as a "doorway or portal" to access systems and information that students, faculty, and staff use in their engagement with Valencia. The Luminis product that serves as infrastructure for the Atlas portal is reaching its End-Of-Life (EOL). While no exact date has been provided, the College is anticipating that product support will cease sometime after mid-2024.

On July 21, 2023, the College issued Request for Information (RFI) 2024-01 to request information that would assist the College in understanding options for replacement of Luminis, as well as the current environment and industry standards for this type of software solution. On August 25, 2023, five (5) vendors submitted information: Digital IT LLC, Ellucian Company L.P, Ex Libris North America, Path Education Inc, and Youngsoft Inc.

The Review Committee examined the RFI responses and detailed documentation obtained during research, and invited two (2) vendors for further thorough review: Ellucian Company L.P. and Path Education Inc. This review and analysis included several weeks of question/answer sessions addressing functional, technical, and content management business requirements, as well as considerations of implementation and training methodology, and product and customer support. It was determined that Path Education, Inc and its Pathify product solution will best meet the needs of Valencia College, for its replacement of the Luminis portal product.

In accordance with State Board Rule 6A-14.0734 (2)(g), F.A.C., Valencia negotiated the best rate with Path Education Inc., to procure their Pathify product solution. The proposed agreement is a three-year agreement for a total combined cost of $697,065.

RECOMMENDED ACTION:

The President recommends that the District Board of Trustees of Valencia College authorize the College to enter into an agreement with Path Education Inc. to procure the Pathify product solution, for a period of three years (with the option of successive one (1) year renewal periods to ensure continuity of operations), at a total combined cost of $697,065, as presented.
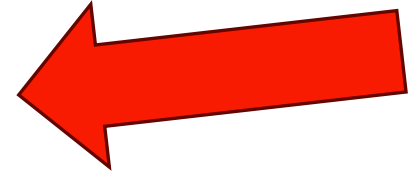
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President

Financial Aid and Student Engagement (Portal) Support
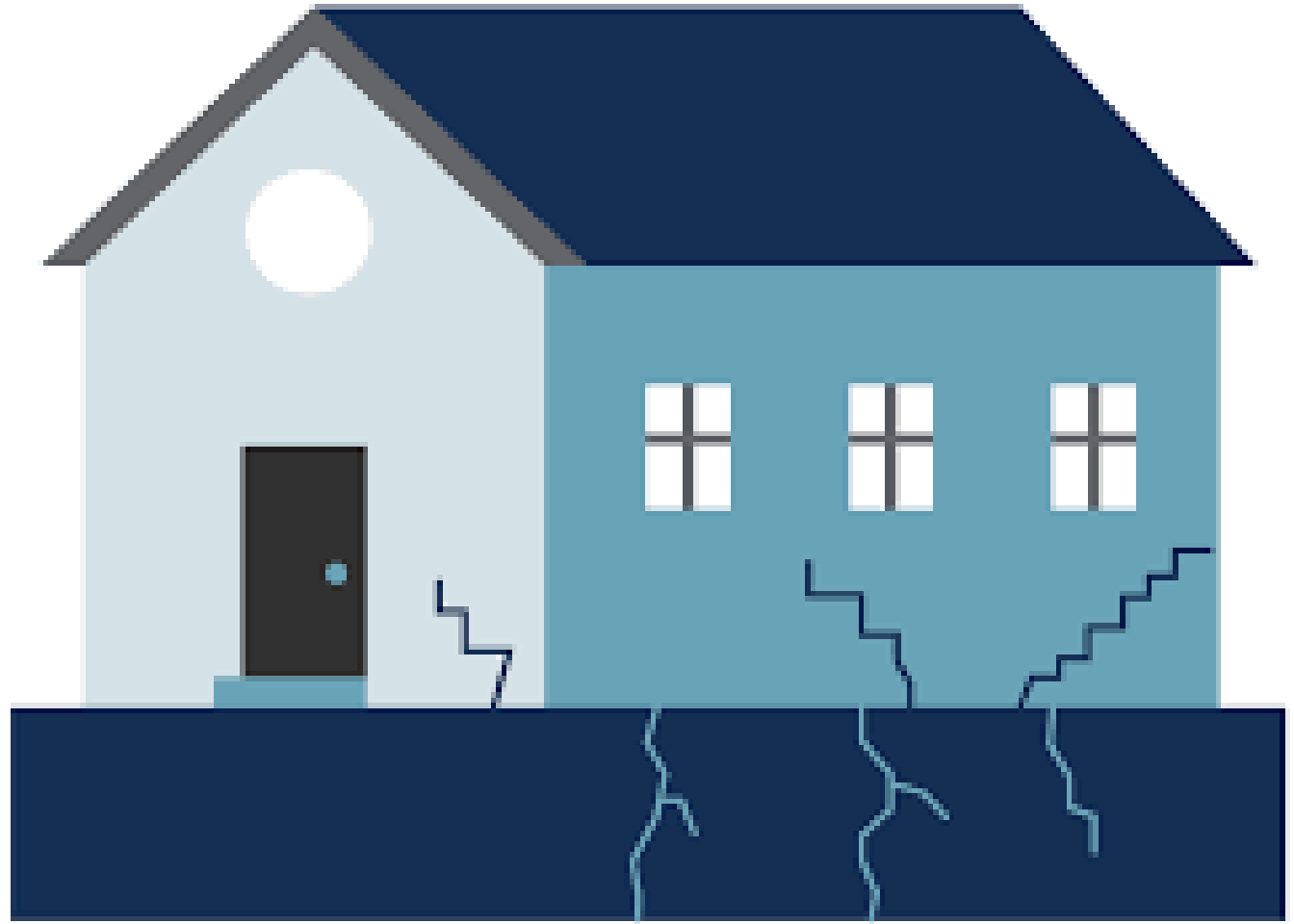
Next Phase of Work

- **Changes related to FAFSA simplification**

- **Replacement of portal (Atlas)**

- Full implementation of CRM to support advisor/student case management

- Implementation of educational planning tool

Financial Aid Support (SIG)

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Financial Aid Changes for 2024-25
    - Replace Estimated Family Contribution (EFC) with Student Aid Index
    - Modify Title IV Funding Formula
    - Modify definitions of family size
    - Expand access to Pell Grants and maximum grant
    - Streamline the FAFSA form

Importance of Financial Aid for Valencia College Students
    - Our students received over $142m in aid in the 22-23 year
        - This aid includes Pell Grant funds for student expenses
    - 44% of our students receive some type of financial aid

Strata Information Group (SIG) Consultant Support
- The consultant support provides the financial aid and technology teams access to two full-time consultants for the entire 2024 calendar year as needed

- The contract does not assume all hours will be needed and used. We will be able to scale the support as needed.

Student Engagement Portal Pathify

Background and Search Process

- Our current portal will no longer be fully supported in late 2024

- Our goal was to find a portal that would provide:
  - A native mobile experience for students, faculty, and staff
  - More communication options (e.g., notifications)
  - Better engagement aligned with college role
  - Easier content management separated from our public website
  - Cloud-based solution to 'scale up' as needed
  - Provide connections that improve retention and graduation

- We used surveys, focus groups, and technical analysis

How is Pathify different?

Engagement Hub

Dynamically surfaces key information

Easily find anything relevant

Connects to people (not just systems)

Serves every constituent

Pathify

Next Steps

- Finalize contract

- Demonstrations to college groups and initial training

- Transfer of content and set up of new features

- Tiered release to students followed by faculty/staff

Questions?