



May 26, 2022

TO: THE DISTRICT BOARD OF TRUSTEES OF VALENCIA COLLEGE

FROM: DR. KATHLEEN PLINSKE
President

RE: INFORMATION AND TECHNOLOGY/STUDENT AFFAIRS TECHNICAL
SUPPORT FOR FINANCIAL AID – CAMPUSWORKS, INC.

As Valencia emerges from the pandemic, we have identified substantial opportunities to improve our students' experience through the financial aid and enrollment process. One of the core recommendations from our business process review has been to provide financial aid awards to students earlier, develop a new registration calendar that supports our strategic access goal, and fully use the functionality of existing software. These efforts will result in the following outcomes for FY23 and beyond:

- (1) Provide financial aid awards to students 8-12 weeks earlier than in prior years
- (2) Restructure enrollment calendars to provide registration 6-8 weeks earlier than in prior years
- (3) Reengineer our core systems to achieve operational efficiencies in financial aid and enrollment
- (4) Extend new software capacities to students, staff and faculty

Valencia recommends the engagement of an external firm with specialized expertise to support financial aid related technical needs associated with the project. The vendor selected has targeted experience with technology transitions that will meet our stated goals. As permitted by law, the College leveraged Florida Administrative Code (F.A.C.) 6A-14.0734 (2)(f), Procurement Requirements, to negotiate a contract, at an estimated, not-to-exceed budget of \$754,048 with CampusWorks, Inc. to assist and support the efforts of the College in addressing financial aid and enrollment related support for FY23. Additional needs beyond FY23 will be evaluated as the project progresses.

RECOMMENDED ACTION:

The President recommends that the District Board of Trustees of Valencia College authorize the College to enter into a mutually agreeable contract for services with CampusWorks, Inc, with a not-to-exceed budget of \$754,048, as presented.



President

Student Affairs Business Process Review

District Board of Trustees Update
May 26, 2022

VALENCIA COLLEGE

CampusWorks Engagement

- Board authorized engagement in October 2021
- Student experience visioning sessions in February 2022
 - Over 700 faculty, staff, and students participated in two sessions
 - Explored ideas of how we want students to experience Valencia
 - Created the student experience vision statement which is guiding the business process review and redesign
- CampusWorks + Valencia Big Table
 - CampusWorks senior leadership joined Valencia senior leaders on campus in March 2022
 - Prior to the Big Table, CampusWorks reviewed hundreds of documents outlining our current processes and feedback from the Student Affairs team and students
 - Prioritized three “Big Rocks” and identified a number of other opportunities to improve practice
 - Financial Aid redesign
 - Student Engagement (student communications redesign)
 - Improvements in governance, decision-making, and data usage in Student Affairs

CampusWorks Engagement

- Process Reimagine and Redesign sessions underway
 - Financial aid completed and final report in draft
 - Additional sessions include:
 - Outreach and recruitment, Answer Center, enrollment services, application, residency, placement testing
 - Orientation, advising, degree planning, career services, students with disabilities
 - Registration, grades, transcripts, and student records
 - Academic scheduling, academic policies, curriculum management, internship services
 - Business office, student payments

Banner Financial Aid Reimplementation

- Banner Financial Aid reimplementation
 - This work must be started this summer to impact Fall 2023
 - Technical expertise needed to support the Financial Aid and Information Technology teams
 - CampusWorks additional contract presented today will improve our systems allowing us to:
 - Improve speed of packaging student financial aid which will impact our progress toward achieving all four strategic impact plan goals
 - Create a more efficient Financial Aid staffing model
 - Provide a better student experience at a critical moment of their Valencia experience
- Additional operational changes needed to fully realize the benefit of the implementation including:
 - Accelerate the packaging of aid earlier in the academic year
 - Restructure enrollment calendars to provide more time for personalized contact

What will students experience?

- Earlier financial aid awards that provide better information about college costs and financial support
- Earlier registration that will permit stronger interactions with students while they are enrolled in high school
- Increased efficiency in the submission of financial aid documents and verification process through CampusLogic
- Fewer conflicts for student affairs services including orientation and advising

What will staff experience?

- Additional weeks to provide advising, financial aid and other supports with an extended enrollment calendar
- More time to engage in direct student support with increased efficiencies
- More functionality in core software with the reengineering of Banner modules
- Higher levels of support from our school district partners due to the overlapping enrollment and school district calendars

Next steps in business process review

- Student Communication Strategy
 - Student communication improvements will help students stay informed and receive appropriate support during their enrollment in the college
 - A Title V grant that would support this work for the college is being written
 - This will be presented to the DBOT in June 2022
- Student Advising and Pathway Improvements
 - Students would benefit from increased information about their degree progress
 - Advising interactions could be more relational than operational
 - Evaluating improvements to degree planning software to include transfer pathways
- Governance and Data Use improvements
 - Restructuring the functional and technical relationships for software and process design
 - Increased training and metric development/monitoring for the Student Affairs team