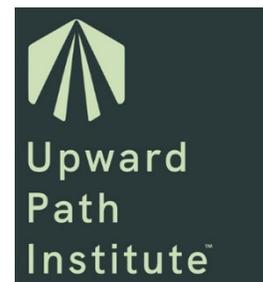




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Upward Path Institute – Helping Students Across the U.S. Prepare for College Admissions, Choosing a Major and Career Path



Vinnie Gupta
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“98% of our students have been admitted into colleges ranked in the top 10% of the country.” Vinnie Gupta

CEOCFO: *Mr. Gupta, first would you give us a little background on yourself and where the passion for education and the U.S. college admissions system came from?*

Mr. Gupta: I grew up in India and went to some of the best colleges there getting my undergrad, graduate and MBA. I also worked there for a bit, before coming to the United States with my wife and our two-year-old 30 years ago. We started our lives in Southern California and moved up to the Bay Area where we are today. I worked with different technology companies on the business and strategy side. Around the age of 50, I was not finding career fulfillment. I started asking myself what I was giving back to my community. I was working with big companies at that time that silo you in one box. All of that resulted in fulfilling the entrepreneurial itch that I had for about 30 years.

My passion for education and the U.S. college admissions system stemmed from my wife and I's struggle to support our daughter with the high school journey and college admissions. That struggle continued through college and her transition to a career. My wife and I are both highly educated. My wife happens to be a highly accomplished and nationally-recognized teacher in the U.S. school system. However, since we didn't go through the U.S. school system, as well as the college system, we had a hard time helping our daughter through college admissions, so her dreams were not met. She changed majors while in college five times and struggled with finding internships and her first job. It all worked out in the end, but it was hugely stressful.

A lot of my passion for the U.S. college admissions system and education comes from our experience. Through my personal journey, I realized the K-12 system is not guiding young people in choosing their careers properly or developing the right kind of attributes that are needed for success and a career. If I could turn the clock back on my life, I would turn it back 30 years. What if I could have done what I'm doing now 30 years earlier? I would be so much better and so would the world. This all

resulted in the founding of UCEazy. That is the company that I cofounded, which is now called Upward Path Institute.

CEOCFO: *Would you tell us how you became involved with your cofounder VK Kolady and the original idea behind the company?*

Mr. Gupta: VK Kolady is also an Indian immigrant like me. We met through playing on the same competitive cricket team. Every weekend, we would spend about four hours together. They say the best way to know a person is by playing a round of golf. Our situation was similar, but we were playing a round of cricket every weekend for about 10 years. Through that experience, we built a tremendous relationship and know everything about each other.

He had an entrepreneurial itch and was not happy in the corporate world. Like myself, he is an immigrant and highly educated from a technology background but struggled to support his children through the U.S. education system. We have the same life experiences struggling to support our own children because we are immigrants and want to give back in some way. That is how we got together and formed our original company, UCEazy. The name stands for University and College Admissions Made Easy.

CEOCFO: *You recently did a name change from UCEazy to Upward Path Institute. What was the reason for the name change? What will be different as you move forward?*

Mr. Gupta: UCEazy focused on college admissions, helping students simplify the college admissions process, and helping them stand out in college admissions. Upward Path Institute's focus is like UCEazy, plus career readiness.

The second difference is that UCEazy was primarily about providing high-touch, personalized, one-on-one guidance through the college application preparation process and the application process itself. Upward Path Institute can start in eighth grade. Upward Path Institute is like a school, with a proprietary curriculum, and multiple experts literally teaching students the non-academic element of their development which is required for success in college admissions and beyond.

Upward Path Institute is truly a specialty institute to address the huge gaps that our K-12 system is not addressing. It helps to prepare students for college admissions and the life skills that employers are looking for.

CEOCFO: *What subjects do you cover in educating people toward career paths?*

Mr. Gupta: We do not teach subjects like math or history; students' schools do that. Upward Path adds guidance with academic counseling on things such as what subjects to take and when. We help them choose the right kind of activities and SAT or ACT strategy. In addition, we help them find the right-fit career and college major by giving them a strategy. For example, to choose a career, I am sure most people would say that you at least need to know what you are interested in and you need to know what you are good at. However, the students would say, "I am just 15 years old, so I don't know how to answer any of these questions."

Upward Path Institute has a structured program with the curriculum, just like your school teaches physics, only we will teach you how to identify your interests and your skills. Then, our team will expose you to different kinds of careers so that you could make an informed choice. We have a key focus with a structured program for teaching certain skills and mindsets that are required for success throughout life, be it high school, college and career. For example, critical thinking, communication and professionalism are all learning modules at Upward Path Institute.

CEO CFO: *Why are these important?*

Mr. Gupta: I am actually looking right now at a study done by NACE (National Association for Colleges and Employers), about where employers see the biggest gap between what they need and what college graduates have. The biggest gap is in critical thinking, communication and professionalism. As you look around in your own professional world, you might relate to this. We will teach these skills through a structured program at Upward Path. From what I know, no school or college is teaching these things in a structured program, in addition to academic counseling, extra-curricular activities and actual academic process.

CEO CFO: *What are some of the tools that you use? Is video conferencing a big part?*

Mr. Gupta: We are a completely virtual company and have been since our inception. We were 100% virtual much before COVID. We were one of the first users of Zoom webinar technology when it was in its beta stage. Our team is spread all over the country, so we are big into video conferencing. We meet with students exclusively on a Zoom platform.

To support the students, we have our own portal where students, parents and my team can all access a 360-degree view of our resources. Over eight years, we have figured out how to work well as a 100% virtual organization, not just technologically but also culturally, and how to support students all across the country.

CEO CFO: *What is your geographic reach? Do you help public school students, private school children, home schoolers? All of the above?*

Mr. Gupta: More of our students right now are from public schools than private schools, but an increasing percentage is coming from private schools. Parents are realizing that the expensive private schools are not addressing the critical thinking components like we are. We have a pretty small population of homeschooled students because we have not formally targeted them yet. However, they too benefit from this program.

One key attribute of our program is that students will be taught in a school setting. Imagine if a student in San Jose, California could be working in a school room with students all across the country. Imagine doing projects and interviews with each other. Imagine the collaboration. Our program is open to everyone. When we started, the UCEazy model was focused primarily on students with parents educated outside of the U.S., but Upward Path Institute is open to everyone.

CEOCFO: *So you are no longer exclusively focused on students from first and second generation immigrant families?*

Mr. Gupta: We started by working with first and second-generation immigrants. Now, our program is open to all because we are realizing that there are so many changes with U.S. college admissions. Even families that grew up in the U.S. and went to college here are saying that so much has changed and they need help. Upward Path Institute is now open to all. I ask people who grew up here why they need help and they say a very simple answer, "That was 30 years ago, and everything has now changed."

CEOCFO: *Do you provide services to students in rural as well as urban areas?*

Mr. Gupta: Absolutely. It is an all-virtual model. I actually think our value increased as families move away from these urban centers where a lot more resources are typically available. All of our services are available from the comfort of your home.

CEOCFO: *Would you tell us how you reach those students in need? Do you work with schools, school districts, school board members, parents groups, social organizations? Can and do parents come to you directly such as through word of mouth?*

Mr. Gupta: Having been around for more than eight years, a lot of our prospects have come through word-of-mouth. In terms of our other channels of getting the word out, we work very well with social organizations, community groups and even places of worship where education is part of their charter. We have done a lot of direct-to-consumer advertising through traditional media like radio and television. We have also done standard digital media.

CEOCFO: *Would you tell us about the onboarding process for the student once they enter your program? What is involved, is it easy for them?*

Mr. Gupta: Typically, students only need a laptop with a video, so the onboarding process is straightforward. Once a family enrolls, each family goes through an orientation process structured like a school. There is an element of personalization in our program. There are group sessions with personalization. Their schools offer personalization, and so does our program. The personalized element is where our Upward Path advisor meets with the family and gets them started with the program. It is very straightforward, unlike a school where students must navigate his or her way without anyone holding their hands. At the core of the program, there is always a go-to person and our onboarding process is very straightforward.

CEOCFO: *Would you tell us about your team, where they come from and what you look for in your team members?*

Mr. Gupta: We have a Core Administration Team at the Institute, and we have experts that directly work with students. Our total team membership is about 100 or so at this point. As for the qualifications, in my Core Administration Team, I am very proud that we have a team with diverse skill sets. For the programs, we are touching on college admissions readiness, college readiness and career readiness. Therefore, our team has multiple skills and expertise.

We hire people who understand what employers need. We have people who have worked in university career offices and internships. We have college professors that understand what colleges require in terms of career readiness. We have college admission experts. Half of my team are current or former college admissions officers. We have people that have taught in middle schools and high schools. We have school counselors and people who teach writing for college essays. We have people that teach life skills.

Both the diversity of our team and the commitment and passion for solving this big problem are how we can take on this audacious mission.

CEO CFO: *What is your revenue model? Do parents pay for your programs? Is it affordable?*

Mr. Gupta: Essentially, families pay a tuition fee for the program. It is designed like a school system. A family can do an annual program or sign up for a five-year program. That is our primary revenue model. Parents pay just like they would for a private school, institute or college.

CEO CFO: *Growing a business is expensive. Are you looking for funding or partnerships?*

Mr. Gupta: At this point especially with the Upward Path launch and its potential, we are indeed looking for funding. We are also looking for partnerships that can accelerate how quickly our solutions can be developed and spread the word.

The cost of acquiring customers one at a time can be tedious and expensive. At this point in time, we are looking for funding to help us and our solutions grow faster to get the word out.

CEO CFO: *In closing, can you tell us about some of the successes of your program and why Upward Path Institute is so vital today?*

Mr. Gupta: Unlike a high-profile, expensive private school, we do not cherry-pick our students. We are very proud that over the last several years, 98% of our students have been admitted into colleges ranked in the top 10% of the country. The key is that we do not hand-pick them. We don't have any GPA policies. All of these results are on our website, in terms of how many of our students got into the colleges ranked in the top 25 or in the top 25 STEM (Science, Technology, Engineering and Mathematics) programs in the country. There are many other benefits that parents report to us. For instance, UCEazy's team has been a friend or a mentor and has reduced their stress. When parents feel overwhelmed, our team helps calm them down. Professional advice and those types of support help students pick suitable careers.

The reason Upward Path is so critical today is that metrics tell us that the current K-12 system is frozen in time due to the political divide in this country. What are the symptoms of the problem? Statistics and hard data show that 80% of college students change majors at least once. My own daughter changed majors five times while in college. More than 50% of students do not graduate from college in four years. College admissions are becoming very competitive. When students enter college, 80% of them change their major. As you go into careers, 50% of

employees claim that college graduates are not ready for the real world. A huge percentage of college graduates change their careers altogether and work in something unrelated to their majors when they are in the workforce.

What is going on? Is any of this working? K-12 is doing a basic job for these students to graduate. Our country has changed. and the U.S. Department of Labor had a recent report that every net new job in this country came from college graduates. If that college education is key, all of the metrics show that they should go back and redesign K-12. However, the system remains the same, and students are regressing because of politics, which is why Upward Path Institute is so vital today.

