California
Student Aid Commission

Grant Delivery System Modernization Project (GDSM)

Presented By: California Student Aid Commission

Grant Delivery System Modernization Project (GDSM)

Project Stakeholders

Students / Parents

High Schools

Institutions / Universities

California Student Aid Commission (CSAC)

US Department of Education (DOE)

California Department of Education (CDE)

Military Department – National Guard
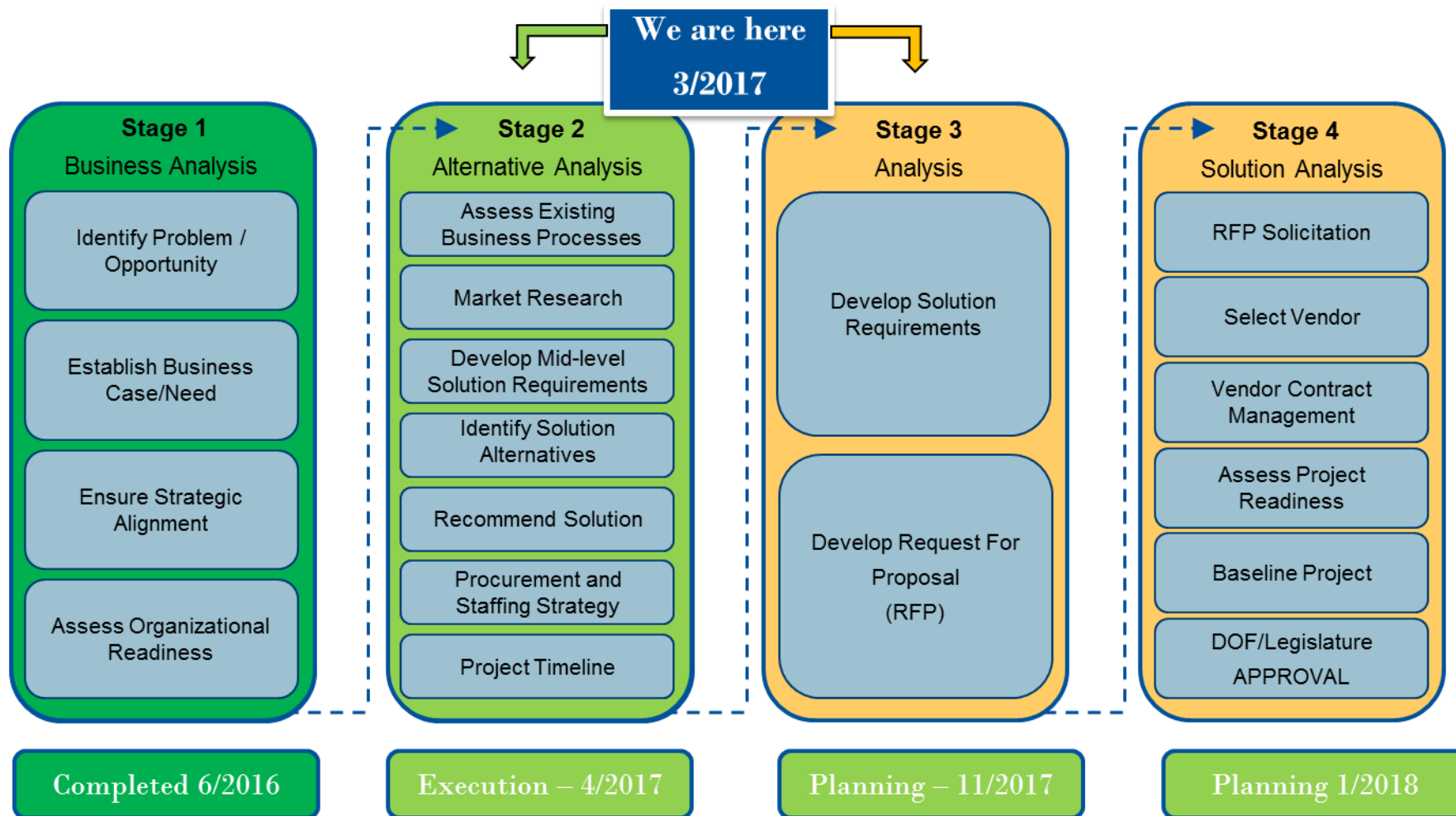
State Controllers Office (SCO)
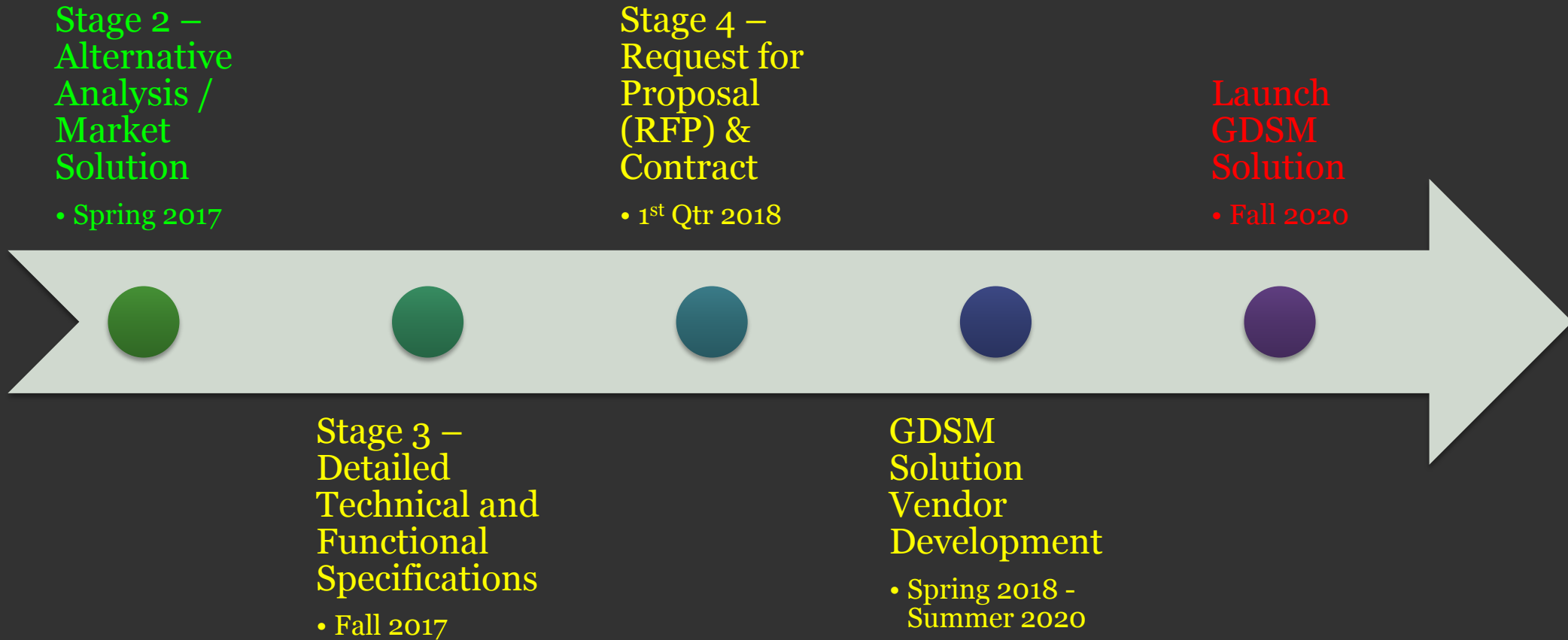
GDSM Project Status
California Department of Technology (CDT)
Project Approval Lifecycle (PAL)

Current State of the Project

Schedule March 2017

We are here 3/2017

Stage 1
Business Analysis
- Identify Problem / Opportunity
- Establish Business Case/Need
- Ensure Strategic Alignment
- Assess Organizational Readiness

Completed 6/2016

Stage 2
Alternative Analysis
- Assess Existing Business Processes
- Market Research
- Develop Mid-level Solution Requirements
- Identify Solution Alternatives
- Recommend Solution
- Procurement and Staffing Strategy
- Project Timeline

Execution – 4/2017

Stage 3
Analysis
- Develop Solution Requirements
- Develop Request For Proposal (RFP)

Planning – 11/2017

Stage 4
Solution Analysis
- RFP Solicitation
- Select Vendor
- Vendor Contract Management
- Assess Project Readiness
- Baseline Project
- DOF/Legislature APPROVAL

Planning 1/2018

3

Grant Delivery System Modernization (GDSM) Project Schedule

Stage 2 – Alternative Analysis / Market Solution
- Spring 2017

Stage 4 – Request for Proposal (RFP) & Contract
- 1st Qtr 2018

Launch GDSM Solution
- Fall 2020

Stage 3 – Detailed Technical and Functional Specifications
- Fall 2017

GDSM Solution Vendor Development
- Spring 2018 - Summer 2020

GDSM Project Objectives

1 – Allow Students, high schools, postsecondary institutions and other state agencies to submit required information electronically via interface for all financial aid programs

2 – Increase online service and information offerings and make them more accessible through the use of mobile technology and devices

3 – Provide transparency, accessibility and openness with our data through online and mobile solutions to promote informed participation by the public

4 – Protect sensitive and confidential data through implementation of robust security and privacy programs

5 – Enhance the value of state information through tools to increase the ease of collaboration and data analysis
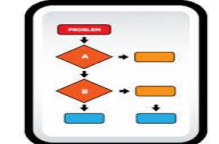
Grant Delivery System Modernization Project (GDSM)

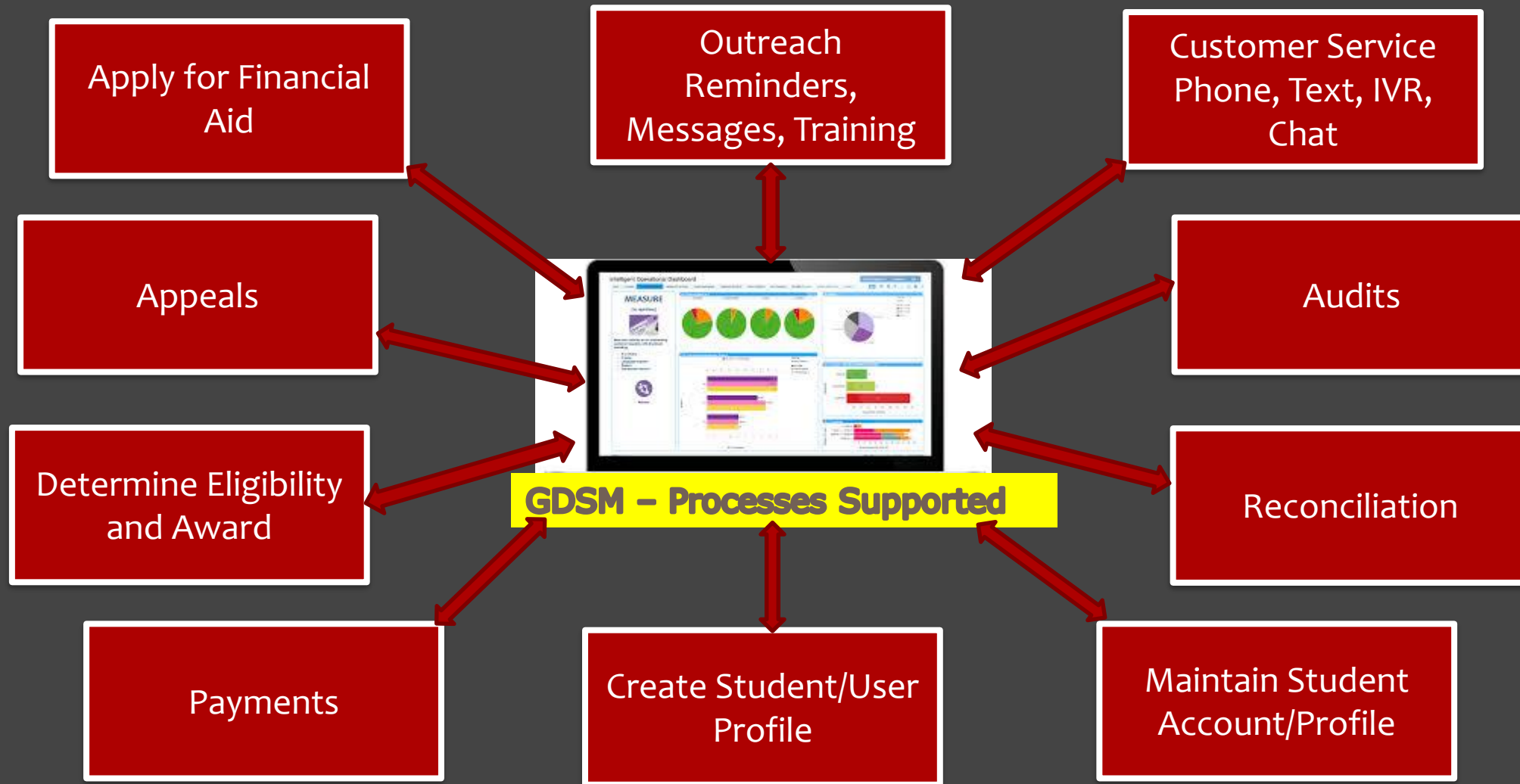## Business Process Transformation & Functions

Business Intelligence / Reporting / Analytics

Funding , Payments

Customer Service – Customer Relationship Management

Integrated – supports all programs - single Data Repository

Business Rules, Workflow, Audits, Appeals, Dashboards

Grant Delivery System Modernization (GDSM) Project
Current vs. Future – Improvements Planned

Area	Current	Future	
Process	Manual / Paper	✓ Fully Automated ✓ Fast Turn Around ✓ Paperless	✓ Workflow (with status bar) ✓ Business Processing Status ✓ Checklists for work flow
Data	Limited Data Security Risk	✓ Reliable ✓ Evidence Based Decision Making ✓ Traceable Transactions ✓ History Logging	✓ Role Based Security ✓ Data Warehouse ✓ Intelligent Tools ✓ Data Marts
Technology	Obsolete, Disparate Systems	**Latest Technology:** ✓ Fully Integrated ✓ Business Rules Engine (BRE) ✓ Business Process Management (BPM) ✓ Customer Relationship Management (CRM) ✓ Document Management System (DMS)	✓ Case Management System (CMS) ✓ Enterprise Resource Planning (ERP) ✓ Integrated Customer Service Phone System ✓ Integrated Voice Response System (IVR) ✓ Configuration and Tailoring instead of Programming Logic
People	Blurred Lines of Responsibility Obsolete Skills	✓ Clear and Distinct User Roles ✓ Responsibilities ✓ Modern Competencies ✓ 21st Century Skill Sets	✓ Outreach ✓ Training ✓ Self Service ✓ Anytime, Anywhere

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Apply for Financial Aid

Outreach Reminders, Messages, Training

Customer Service Phone, Text, IVR, Chat

Appeals

Audits

GDSM – Processes Supported

Determine Eligibility and Award

Reconciliation

Payments

Create Student/User Profile

Maintain Student Account/Profile

New Business Processes – 11 Core Processes

Institution Portal Access to GDMS

Submit GPA's to CSAC, Submit Eligibility Information, Send Student Renewal Data

ADVISORS ▶

Issue Payments to Students for Tuition, Books, Room & Board

Obtain Access – Setup Profile and Users
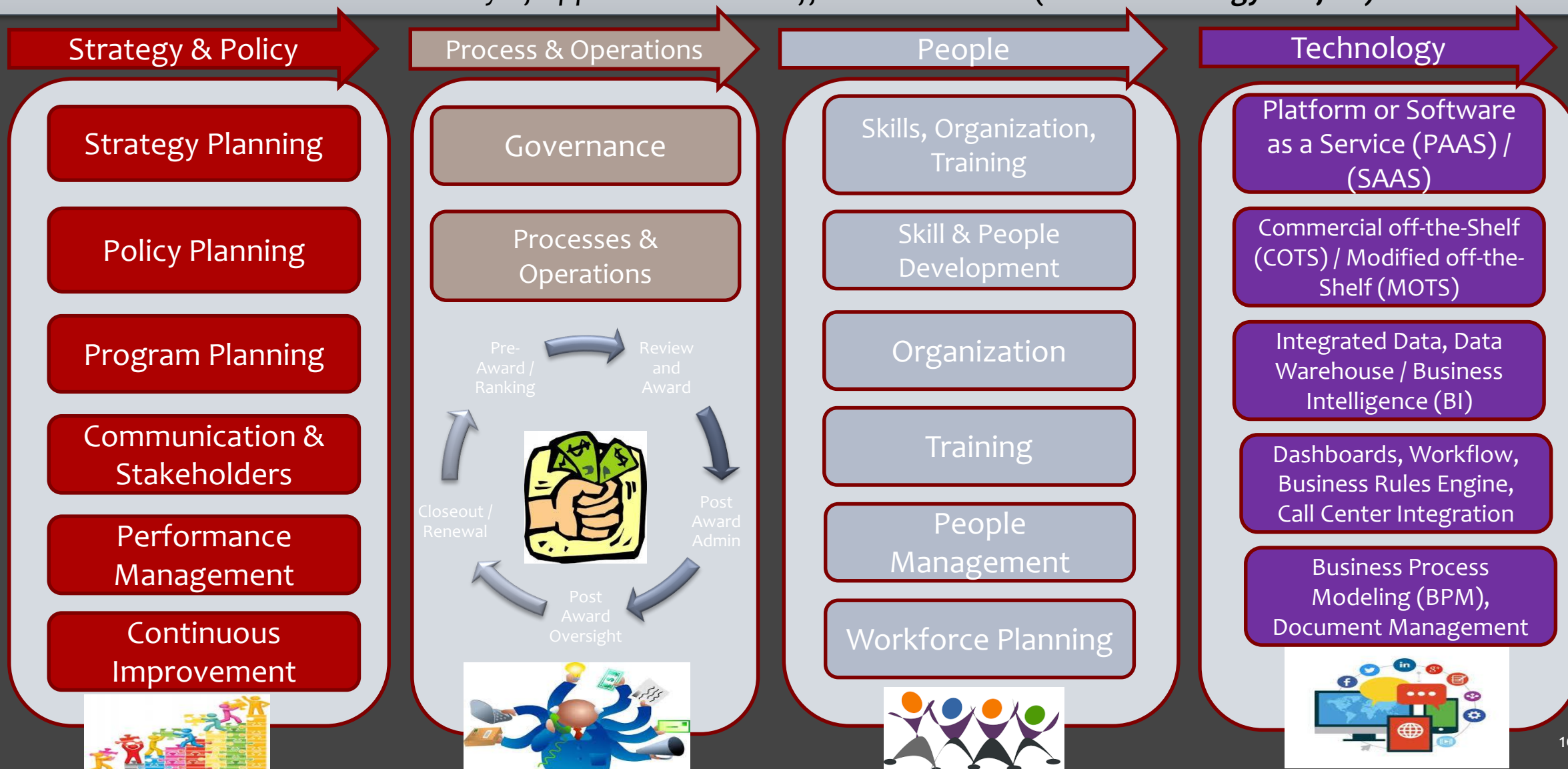
Determine Eligibility and Validate Payments
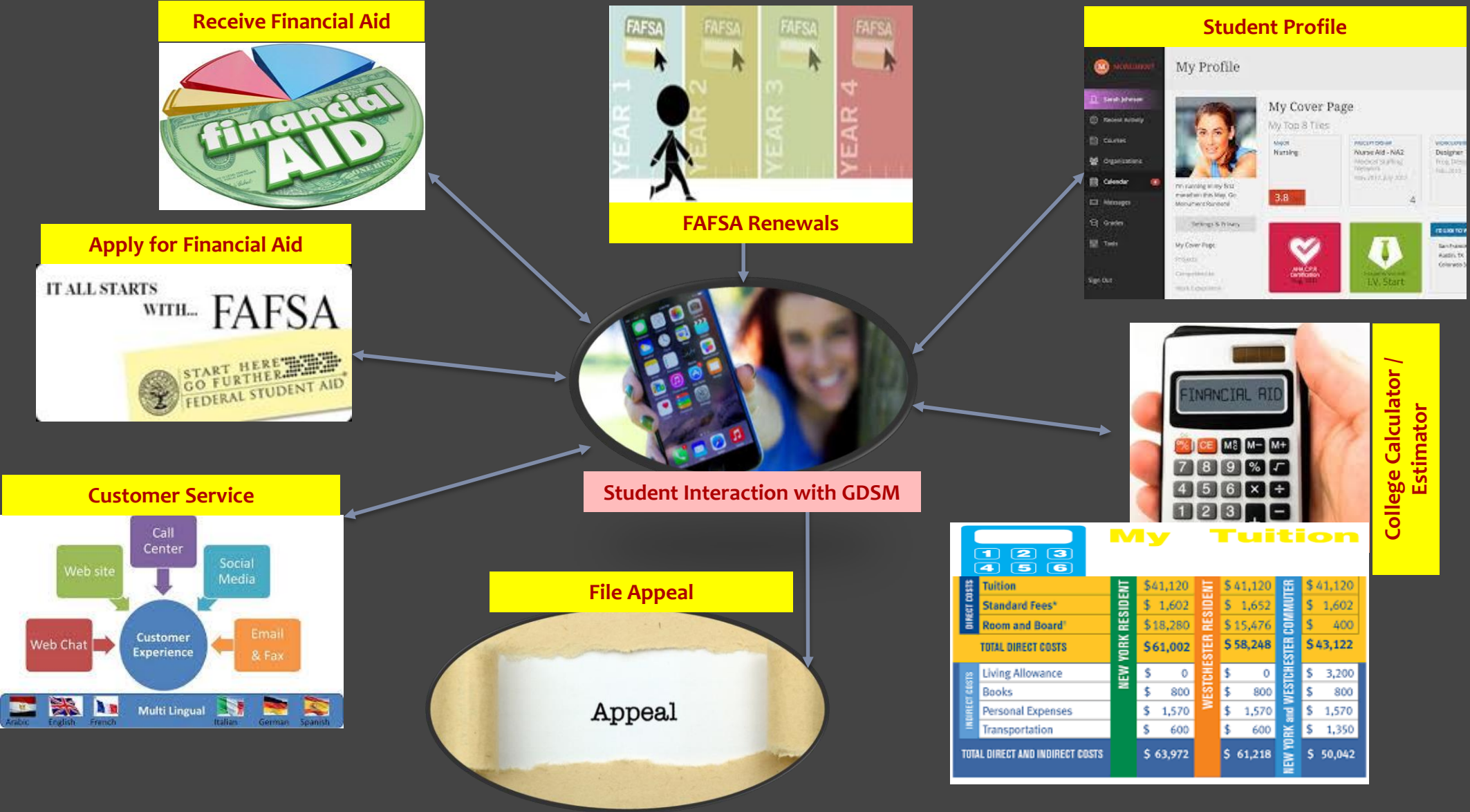
Obtain Payment Rosters for Students
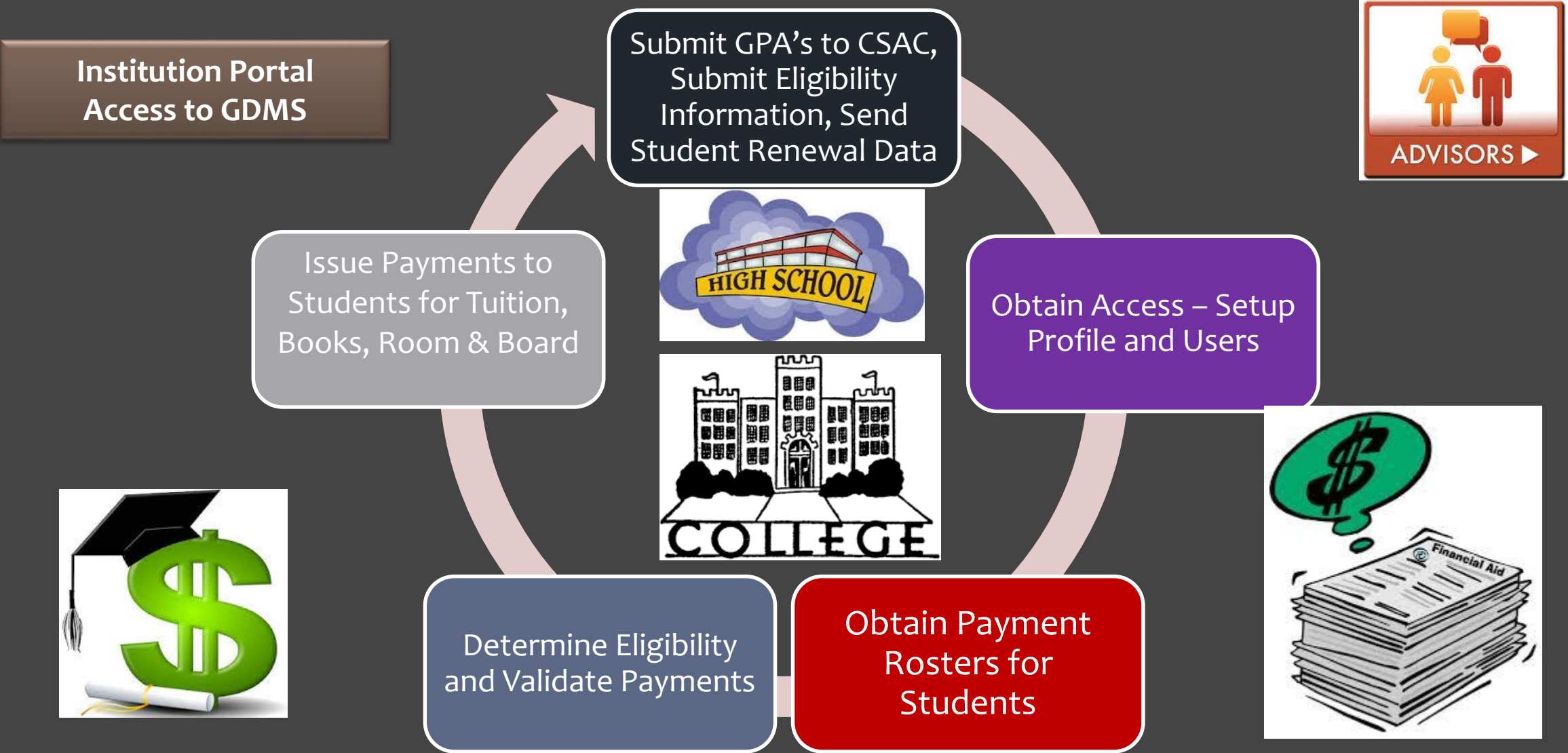
Approach for **Grant Delivery System Modernization (GDSM) Project**

*Effective grant management must take a comprehensive approach across the lifecycle ensuring strategic alignment to maximize accessibility of opportunities and efficient execution (**NOT Technology Project**)*

Strategy & Policy	Process & Operations	People	Technology
Strategy Planning	Governance	Skills, Organization, Training	Platform or Software as a Service (PAAS) / (SAAS)
Policy Planning	Processes & Operations	Skill & People Development	Commercial off-the-Shelf (COTS) / Modified off-the-Shelf (MOTS)
Program Planning		Organization	Integrated Data, Data Warehouse / Business Intelligence (BI)
Communication & Stakeholders		Training	Dashboards, Workflow, Business Rules Engine, Call Center Integration
Performance Management		People Management	Business Process Modeling (BPM), Document Management
Continuous Improvement		Workforce Planning	

Process & Operations lifecycle: Pre-Award / Ranking → Review and Award → Post Award Admin → Post Award Oversight → Closeout / Renewal

Grant Delivery System Modernization (GDSM) Project
Student Portal - Interaction

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CSAC & Institution GDSM Project Champions

CSAC Champions:
Lupita Alcala
Catalina Mistler
Tae Kang
Tabitha Frost
Santiago Morales
Nai Saeteurn
Justin Watkins
Lisa Wright
Dianna Ximenez

CSU Champions:
Dean Kulju
Chip Pierce
Rose Pasanelli

National Guard:
Katrina Beck
Clarita Cortez

UC Champions:
Patrick Register
Chris Carter

Private College Schools:
Lynn Fox
David Allen

Cash for College and Cal-SOAP Champions:
Gina Browne & Steve Caldwell

CCC Champions:
Bryan Dickason
Jana Cox
Marnie Shively
Dennis Schroeder
Patricia Larkin

K – 12 Champions
Christina Espinoza
Gilbert Viveros

Additional Stakeholders Supported

Students and their Parents

Private High Schools

State Agencies
CDE, DOF, CDT, LAO, FTB, CDSS

Federal Department of Education

Research Groups

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GRANT DELIVERY SYSTEM MODERNIZATION (GDSM) PROJECT

5 Things You Should Know About GDSM

1. The Department of Technology developed a Project Approval Lifecycle (PAL) for all Statewide Project Assessments prior to any agency awarding a contract for a new System.

2. GDSM Must Meet the Stage/Gate Model Requirements (which is part of PAL) in order to approve a contract to start the new GDSM Solution.

3. GDSM will make WebGrants4Students website and CSAC Applications Compatible with multiple internet browsers, apps, and mobile devices.

3. One major change that CSAC is hoping to have in GDSM is integration of all CSAC's Programs into one Application Process and System.

5. Project Launch Date is Targeted for Fall of 2020

Meet the GDSM Core Team

The Core Team is a sub-team of CSAC subject matter experts (SME's), whom know the business processes and programs, and will drive the gathering and validation of the requirements for the GDSM Project and Solution.

- Tae Kang
- Dianna Ximenez
- Nai Saeteurn
- Tabitha Frost
- Justin Watkins
- Lisa Wright
- Santiago Morales (no picture)

CALIFORNIA STUDENT AID COMMISSION

GRANT DELIVERY SYSTEM MODERNIZATION (GDSM) PROJECT

FAAB GDSM Subcommittee Meetings

Meeting Overview

During the February Financial Advisory Board (FAAB) Subcommittee Meeting, the GDSM Tea identified the Project Champions for each segment and stakeholders to ensure they are delivering key messages to their users and stakeholders.

The Team also highlighted the GDSM Project Change Management Strategy and the roadmap of how to promote the Project Awareness Goals. The CSAC Methods of Communication / Vehicles are as follows:

❖ GDSM Webpage:
  ✓ GDSMProject.ca.gov
❖ GDSM List Serve
❖ CSAC Conferences
  ✓ CCCSFAAA
  ✓ CSAC Commission
❖ CSAC Newsletters – Monthly
❖ Institution Monthly Meetings
❖ GDSM Project Champion Meetings – Monthly
❖ GDS Current System – will point to GDSM Webpage

Vendor Updates
Solutions Presented to CSAC

❑ Oracle – Platform as a Service (PaaS)
❑ SAP - PaaS
❑ Peoplesoft – Software as a Service (SaaS)
❑ Salesforce - PaaS
❑ Pegasystems - PaaS
❑ Ellucian & Microsoft – Modified off-the-Shelf (MOTS)
❑ GovGrants – PaaS
❑ NelNet - MOTS

Next Steps:

• GDSM Project Workshops to define detailed requirements for the GDSM Solution – weekly, March 9 – May 4, 2017
• GDSM Project Solution Vision
• GDSM Project Solution Roadmap – Functionality and Detailed steps to get there.
• Change Management – Key Messages – Monthly Key Messages disseminated to Stakeholder Groups