

# California Student Aid Commission

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## Item 2. (Information)

### Presentation on the Ontario Student Assistance Program

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#### **SUMMARY:**

Executive Director Alcalá attended a presentation about Ontario, Canada's reform of their financial aid system while at the National Association of State Student Grant & Aid Programs conference and was interested in learning more about Ontario's new financial aid system as a possible model for transforming the Cal Grant program. An invitation was extended to Ontario Student Aid Program staff to present to the Student Aid Commission. The following representatives are presenting via teleconference:

Maria Mellas, Director of Operations, Ministry of Advanced Education and Skills Development

Soussan Tabari, CIO, Ministry of Advanced Education and Skills Development

#### **RESPONSIBLE PERSON(S):**

Lupita Cortez Alcalá  
Executive Director

#### **ATTACHMENTS:**

##### Description

- ▢ Attachment 2.1. Reform of Ontario's Financial Aid System
- ▢ Attachment 2.2. The Role of IT in Delivery of Client Centered Services



# Reform of Ontario's Financial Aid System

Ministry of Advanced Education and  
Skills Development

February 2017

# Overview

- 1 Ontario, Canada**
- 2 What is OSAP?**
- 3 Context for action**
- 4 OSAP Transformation Phase I**
  - 2017-18 academic year
- 5 OSAP Transformation Phase II**
  - 2018-19 academic year
- 6 Continuous Simplification**
- 7 Communicating the changes**

# Ontario, Canada



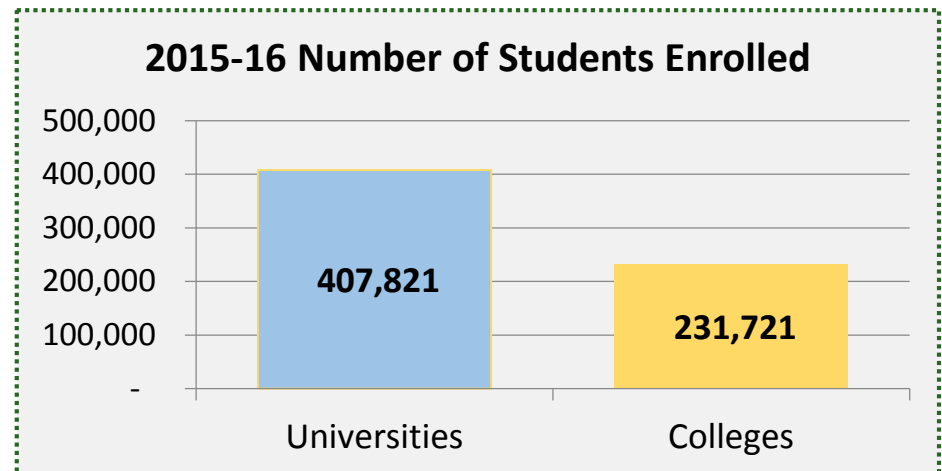
# Ontario, Canada

- Ontario is Canada's largest province by population and second largest by size
- Ontario is home to about 2 in 5 Canadians: Population >14 million
- About 66% of Ontario residents between 25 and 64 have completed postsecondary education

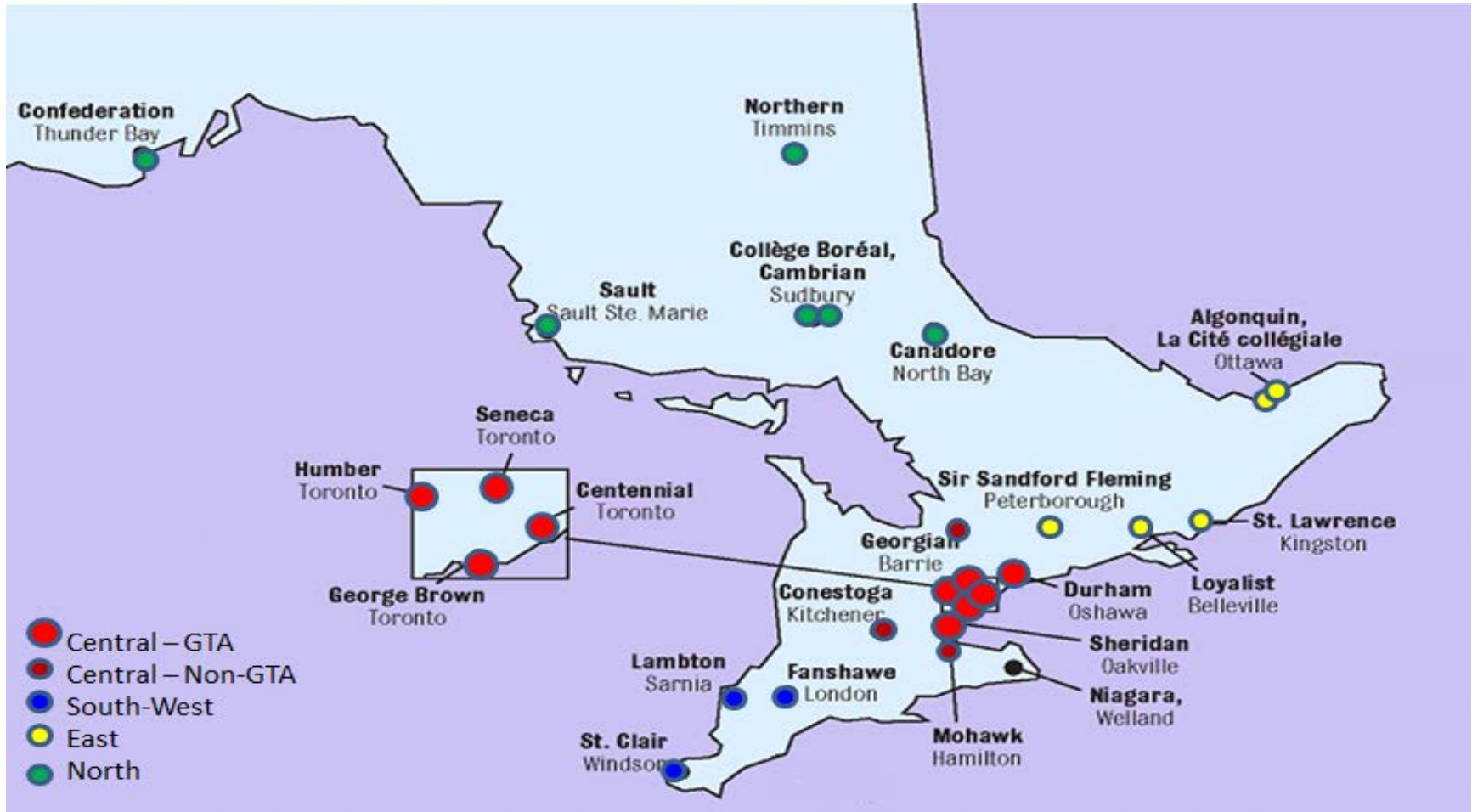


# College vs. University

- In general, college refers to 2-year community colleges and university refers to degree-level programs.
  - Ontario colleges provide over 3,000 programs across a range of credentials, including certificates, diplomas, graduate certificates, advanced diplomas and degrees.
  - Most universities offer a variety of undergraduate and graduate programs, while some have a specific focus (e.g., medicine, arts and design, etc.).
- Public institutions (those receiving most of their funding from government) serve most of the students in the university and college sectors. There are many private providers, especially in the career-focused and vocational sectors.

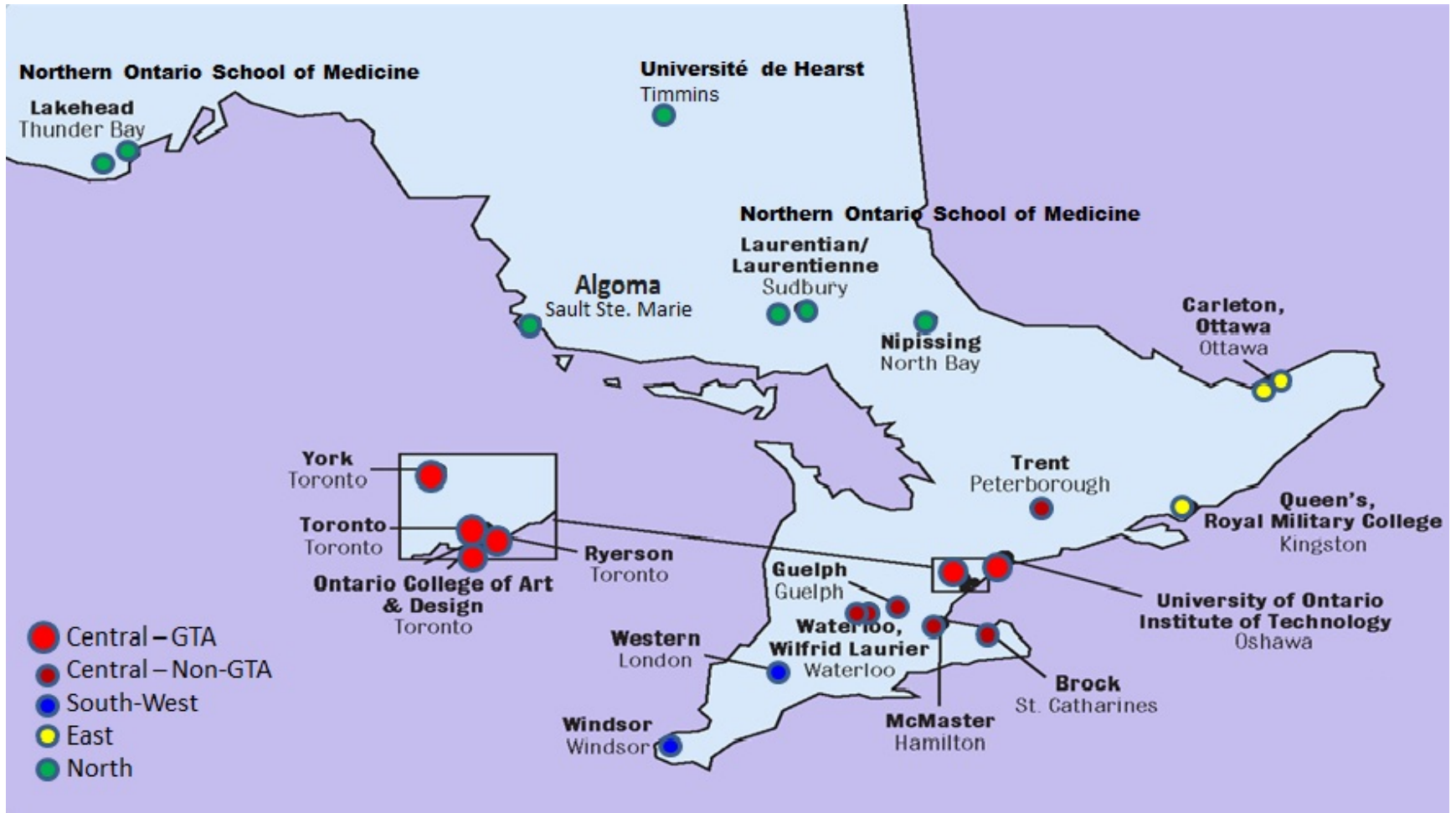


# Ontario Public Colleges





# Ontario Public Universities

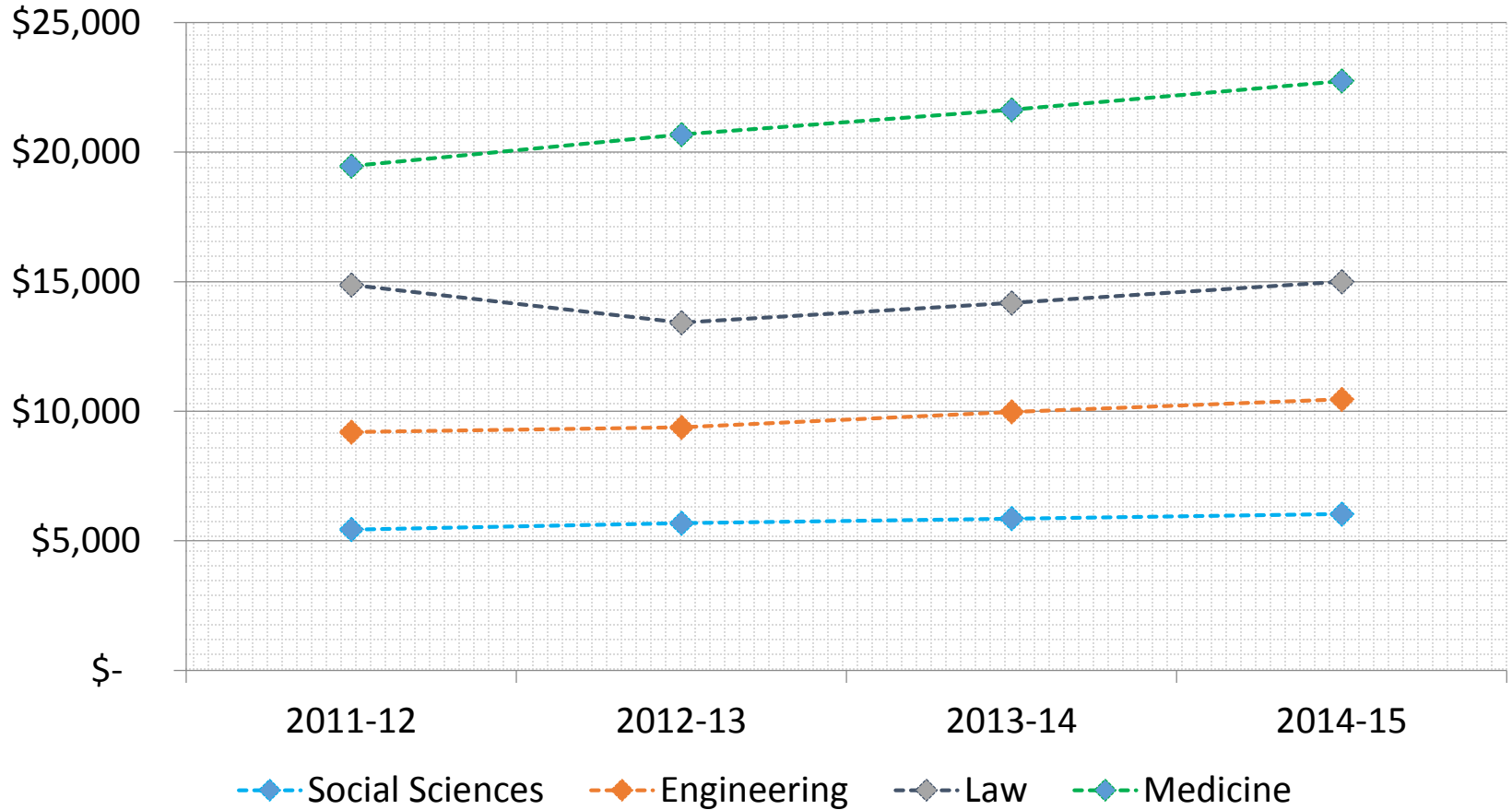




# Applying for College and University in Ontario

- Students can apply to any of Ontario's 24 public colleges through one website: [www.ontariocolleges.ca](http://www.ontariocolleges.ca).
- Students can apply to any of Ontario's 20 public universities through one website: [www.ouac.on.ca](http://www.ouac.on.ca).
- Students need to apply directly through their school if they're:
  - Planning to study part time;
  - A mature student;
  - An international student;
  - Applying for graduate studies (e.g., a Masters or Doctoral degree); or
  - Planning to attend a private college or university.

# Average Tuition in Ontario



\*Source: Statistics Canada, Centre for Education Statistics

\*\*All figures are in Canadian dollars and \$1 CDN = ~\$0.76 USD

# Low Tuition, High Quality Education

- Ontario is home to high quality, internationally respected colleges and universities.
- Three of Ontario's public universities rank in the top 200 of the 2016-17 Times Higher Education World University Rankings.
  - University of Toronto – 22
  - McMaster University – 113
  - University of Waterloo – 173

# What is OSAP?

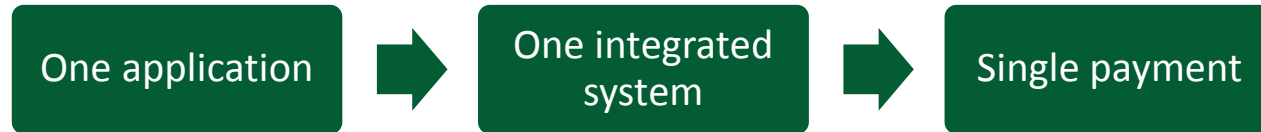


# Ontario Student Assistance Program (OSAP)

- OSAP is an integrated program funded by both the federal and provincial government.
- OSAP provides needs-based assistance through loans and grants to help qualified students and families with the cost of postsecondary studies.
- More than 380,000 students per year benefit from OSAP grants/loans, representing almost 60% of full-time Ontario university students and almost 70% of full-time Ontario college students.
- OSAP is an entitlement program. No cap is set on the number of students who can qualify for funding; eligibility is determined based on student need assessments.



# Canada-Ontario Relationship



- The Government of Canada and Ontario integrated the administration of student financial assistance in 2001.
- Students complete **ONE** OSAP application to be considered for federal and provincial loans and grants.
- Each Canadian province has their own **provincially-branded** systems (e.g., Ontario is OSAP, Alberta is Alberta Student Aid) and the federal government pays the provinces to administer the federal program on their behalf.
- Also, each province administer Aid through its own system, each with huge variability of functionality.
- When a student's loan goes into repayment, the student makes a **single payment**, which is applied against both the provincial and federal loans.

# The Players

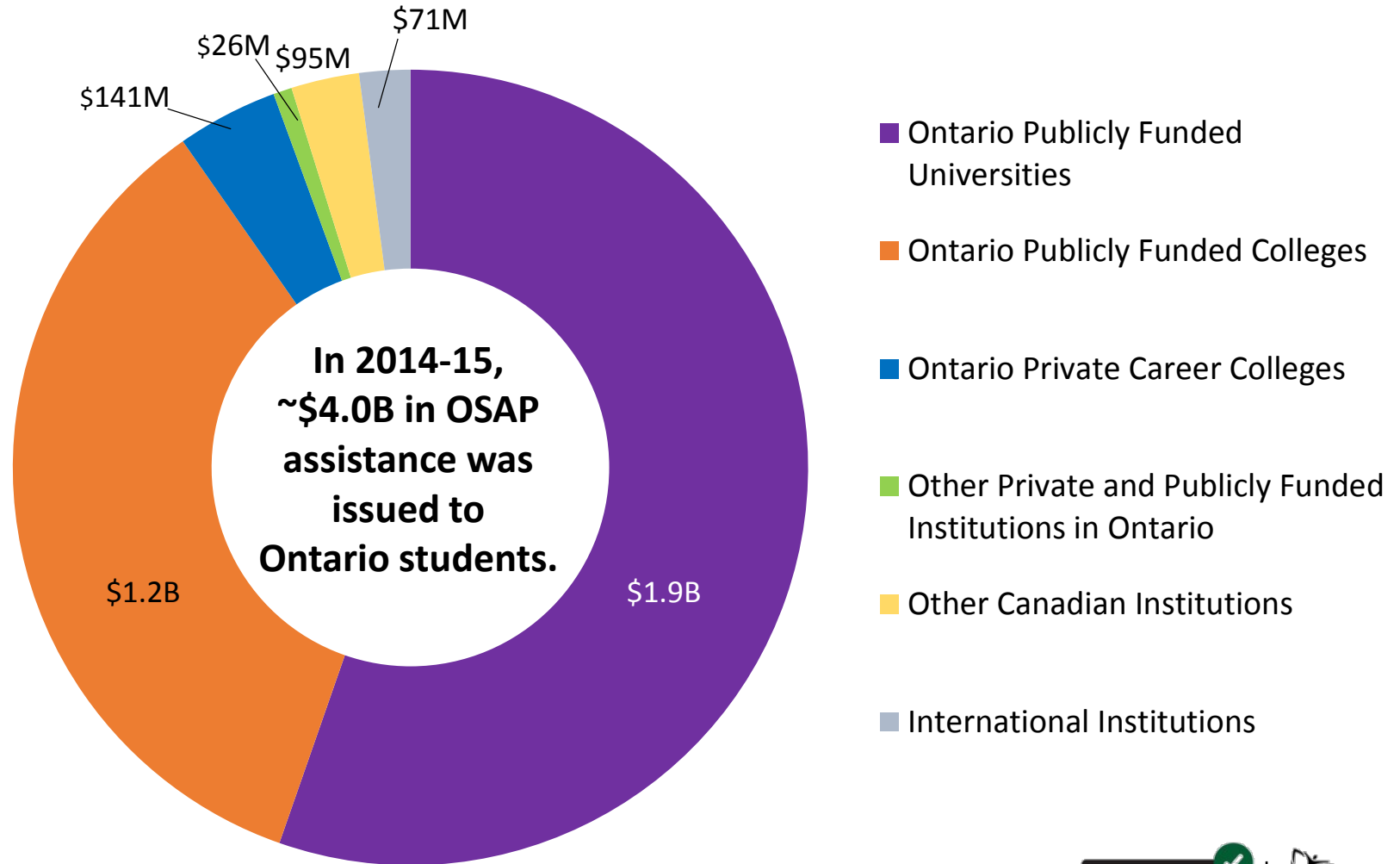
- **The Government of Canada** funds students, but pays provinces to administer programs. They also develops policy for their federal loans and grants.
  - **The Government of Ontario** funds students, develops policy for the provincial loans and grants AND administers federal financial assistance on behalf of the Government of Canada.
  - **The Ontario Student Financial Assistance Branch** oversees the administration of OSAP, which includes collecting and assessing student applications and entitlements, approving institutions and programs, and funding the Ontario portion of aid.
  - **The National Student Loans Service Centre** is a private service provider under agreement with the Government of Canada to administer disbursement and repayment of student financial assistance programs funded by the Governments of Canada and Ontario.
- **Financial Aid Offices** at each of Ontario's postsecondary institutions are the front-line service for students studying in Ontario (e.g., adjusting student applications, reviewing supporting documentation, etc.).



# OSAP participation rates



# OSAP by institution type



Canada issued \$1.7B in loans; \$500M in grants.

Ontario issued \$360M in net loans; about \$1.0B in grants.

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# Who is eligible for OSAP?

To be eligible for OSAP, students must be:

- ✓ A Canadian citizen, permanent resident or protected person.
- ✓ An Ontario resident.
- ✓ Attending an OSAP-approved program and school.
- ✓ Enrolled full-time in a certificate, degree or diploma program that is a minimum of 12 weeks in length.

Ontario students can still receive OSAP if they enroll in a program offered at a college or university outside of Ontario. However, they are only eligible for federal funding (\$210/week maximum).

# Determination of OSAP entitlements

<b>Allowable Educational Costs</b>	<i>minus</i>	<b>Expected Financial Contribution</b>	<i>equals</i>	<b>Calculated Financial Need</b>
Tuition and Compulsory Fees* Books and Supplies** Equipment Computer Costs Personal Living Expenses Child Care Travel		Student Fixed Contribution Student Assets Parental Income Spousal Income Spousal Assets		Federal Assistance (60% of assessed need subject to maximum)  Provincial Assistance (~40% of assessed need subject to maximum)

\* For some programs (graduate, professional and high demand college programs), Ontario caps how much tuition and fees it will recognize in the OSAP assessment. Canada recognizes full tuition.

\*\* Includes such costs as uniforms, minor laboratory equipment, professional association and examination fees, field trips, and graduate thesis costs.

# Context for action



# Context for action

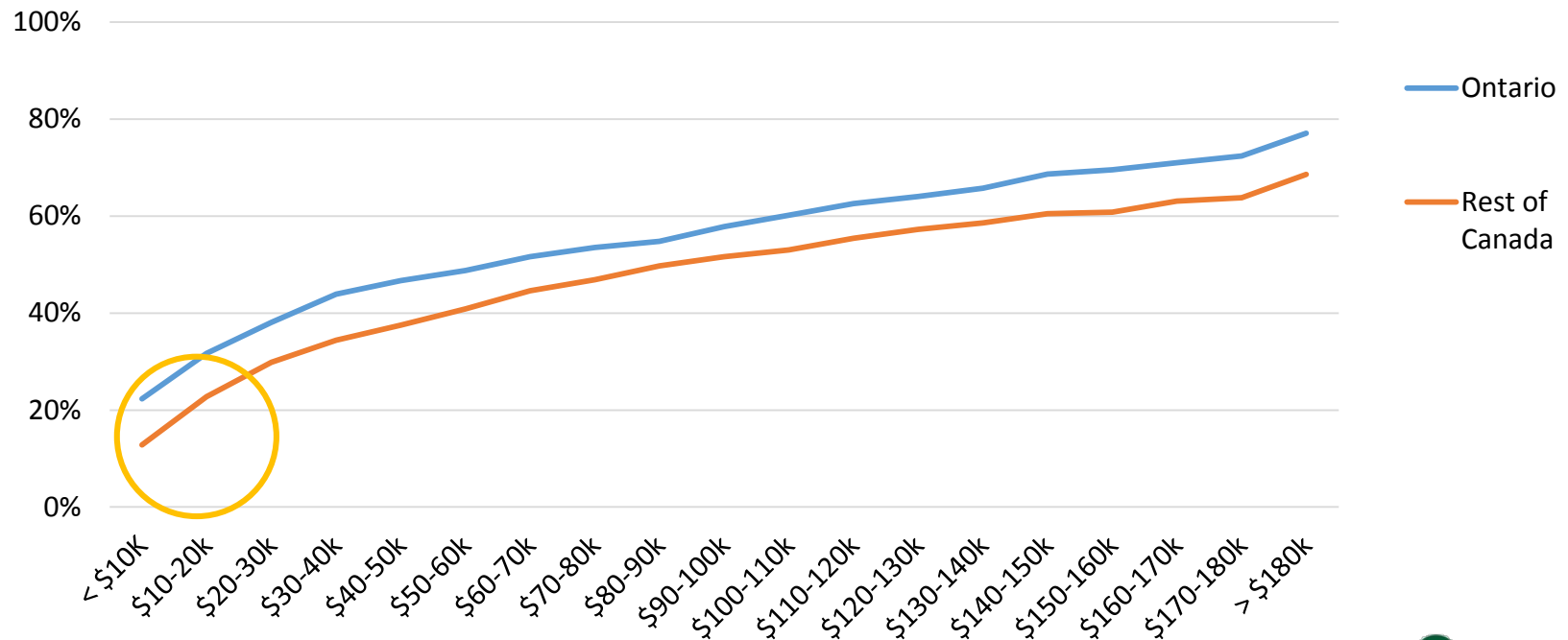
- The government has introduced changes to make OSAP simpler and fairer for students resulting in more than double the number of students accessing OSAP over the past 12 years:
  - **Indexed the Ontario maximum student aid levels** annually to inflation.
  - **Simplified expected student contributions** to \$3,000 from each student.
  - **Introduced the 30% Off Ontario Tuition grant** for students from low- and middle-income families in January 2012.
  - **Capped students' annual repayable debt** through the Ontario Student Opportunity Grant.
  - **Created a Distance Grant to help students from rural and remote areas** with their commuting and travel costs and francophone students pursuing full-time studies in French.
  - **Streamlined and modernized** the student financial assistance program to make it easier and faster for students to receive their aid.
  - **Introduced the Repayment Assistance Plan** for borrowers who are experiencing financial difficulties in repayment.



# Context for action

- There remains a concern that students from lower income families continue to participate in PSE at much lower rates than those from higher income families.

2013 Postsecondary Participation Rates by Parental Income  
18 to 21 Year Olds





# Limitations of the current program

**MATURE LEARNERS**, and those with children, are not sufficiently supported with non-repayable grants and help with tuition costs.

**BACK-END SUPPORT**, like debt relief through the Ontario Student Opportunity Grant and the Tuition and Education Tax Credits, is not well-understood by students.

**MANY LOW-INCOME STUDENTS ARE DISADVANTAGED** because they go to low-cost programs (e.g., college), and incur a larger proportion of their costs as loans.

**NUMBER AND COMPLEXITY OF GRANTS** under OSAP are not well-understood, and can be confusing to students. There are over 20 different OSAP grants.

**PARENTAL CONTRIBUTION** requirements toward the costs of a student's education are high for middle-income families in Ontario, much higher than Canada/other provinces.

**'NET' TUITION**, or the price of tuition/education after non-repayable government assistance, is largely unknown to students in Canada.

# Objectives of reform

**NO PROVINCIAL STUDENT DEBT** for students from families with annual income of \$50k or less.

**CLEARER AND MORE TRANSPARENT NET TUITION COSTS** of postsecondary education, by applying up-front grants directly to reduce tuition/educational costs.

**WORK WITH COLLEGES/UNIVERSITIES** to implement by Sept 2018, an offer and billing system that takes into account government and institutional grants for students, reflecting net tuition.

**INCREASED GRANTS FOR MATURE STUDENTS**, making tuition support available to all students.

**REDUCED NUMBER AND COMPLEXITY OF GRANTS** delivered through OSAP (i.e., eliminate the 30% Off Ontario Tuition, Ontario Access Grants, Childcare Bursary and OSOG).

**IMPROVED ABILITY TO CONTAIN STUDENT DEBT** by redirecting increased tax revenue to up-front grants.

**IMPROVED ACCESS TO SUBSIDIZED LOANS** for middle-income families, by reducing parental contributions.



# Timing of transformation

Two phases of the new OSAP with full implementation in 2018-19.

## Phase I (2017-18):

- Consolidate many existing OSAP grants
- Increase Ontario weekly assistance limits

## Phase II (2018-19):

- Reduce parental and spousal contributions
- Net tuition system in place

# OSAP Transformation Phase I

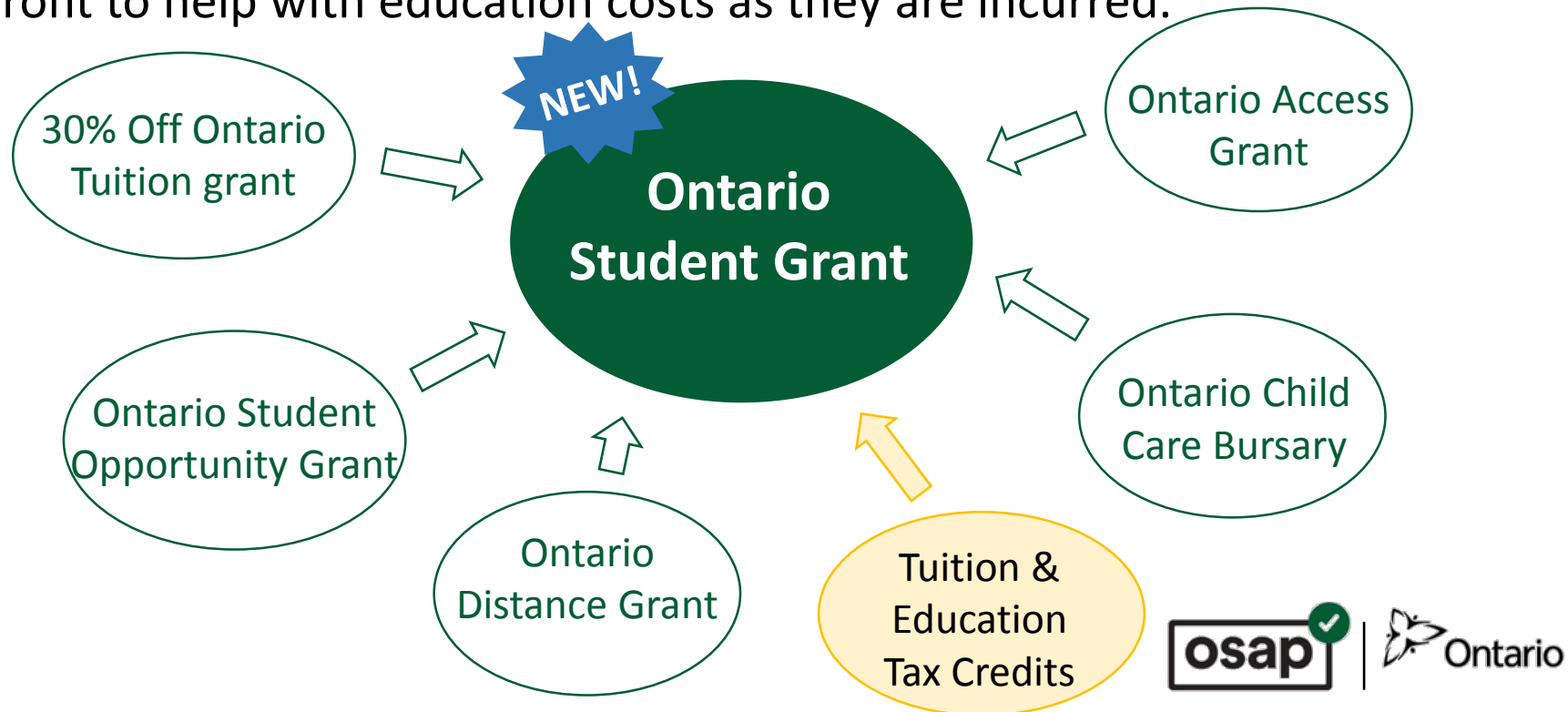
## 2017-18 academic year



# Phase I: Consolidate existing grants

Ontario is replacing many provincial grants with a single new Ontario Student Grant starting in the 2017-18 academic year.

Financial support previously provided at various times (e.g., start of studies, end of studies, or years later) will now be provided to students upfront to help with education costs as they are incurred.



# Phase I: Consolidate existing grants

## 2016-17 Distribution of Financial Support

September 2016



1<sup>st</sup> instalment of OSAP grants and loans

January 2017



2<sup>nd</sup> instalment of OSAP grants and loans

August 2017



Debt remission (grant issued to reduce annual debt to \$7,500)

Future tax credits



Ontario tuition and education tax credits

## 2017-18 Distribution of Financial Support

September 2017



1<sup>st</sup> instalment of OSAP grants and loans

January 2018



2<sup>nd</sup> instalment of OSAP grants and loans

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February 23-24, 2017

# Phase I: Increase OSAP assistance levels

Ontario's maximum OSAP assistance levels will be increased.

\$160/week **→** **\$180/week** for single students

\$360/week **→** **\$450/week** for married and sole support students

Canada provides \$210/week for all student types

## Maximum OSAP Assistance Levels

	2016-17		2017-18	
	Weekly	34-week program	Weekly	34-week program
<b>Single students</b>	\$370	\$12,580	\$390	\$13,260
<b>Married / sole support students</b>	\$570	\$19,380	\$660	\$22,440

\*Amounts based on both federal and provincial aid.



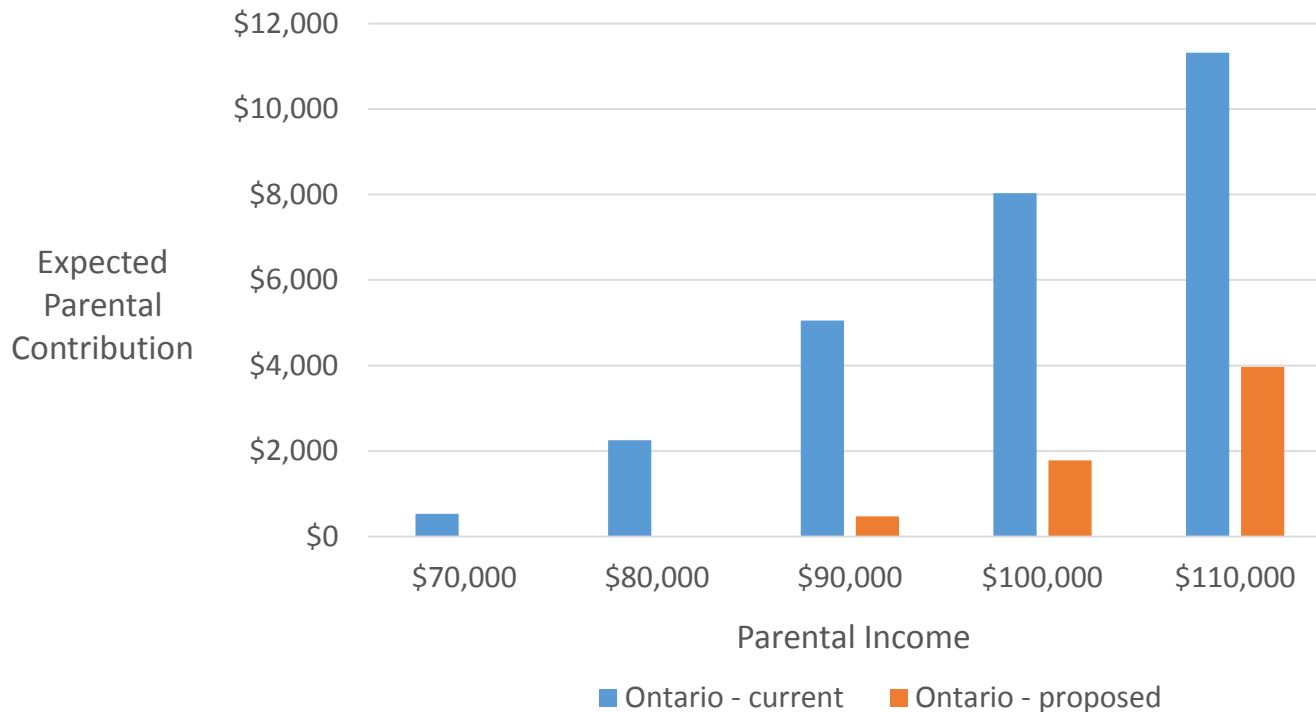
# OSAP Transformation Phase II

## 2018-19 academic year



## Phase II: Reduce parental contributions

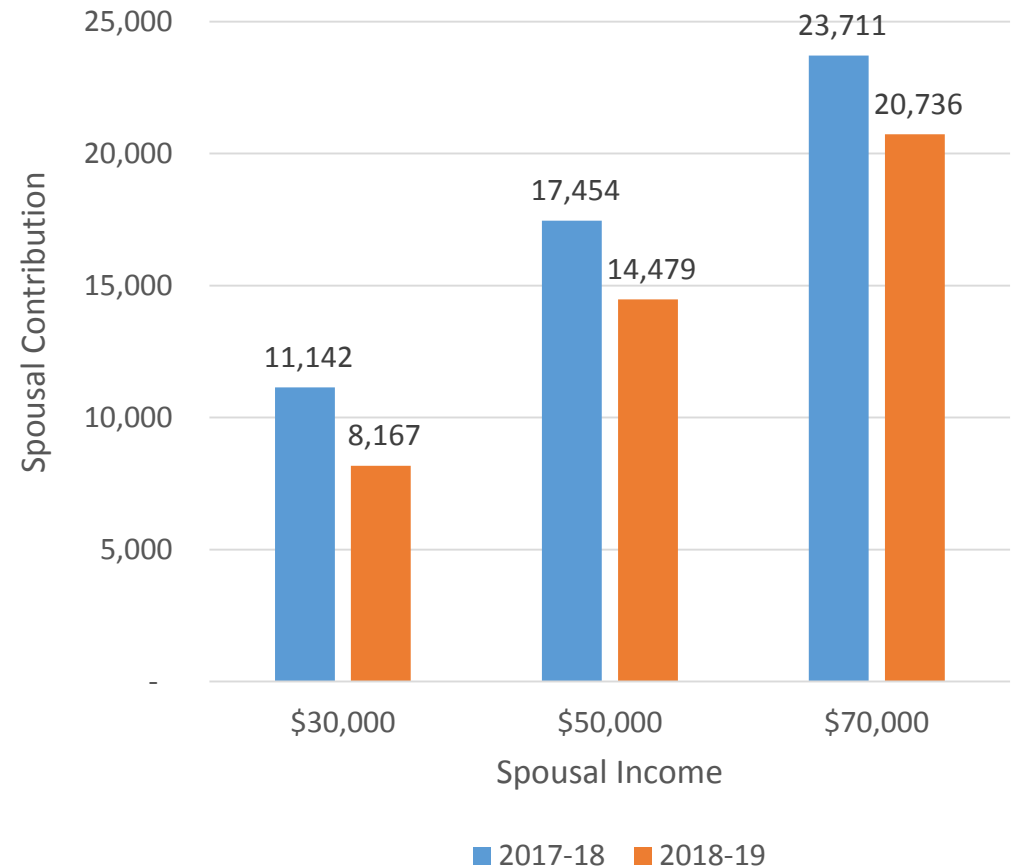
Ontario will reduce the contribution it expects from parents of dependent students and align more closely with Canada. For example, Ontario would not expect a family of four to contribute until an income of \$86,000/year is reached, up from \$68,000/year today.



# Phase II: Reduce spousal contributions

Ontario will also reduce required spousal contributions.

- Currently, Ontario expects spouses to contribute 70% of actual income net of taxes and deductions for the study period weeks.
- Starting in 2018-19, contribution rates will be graduated, starting at 25% for students with little discretionary income and gradually increasing for students with more income.



## Phase II: Net tuition

“Net tuition” is applying students OSAP aid and institutional aid, if applicable, against their tuition fees.



Net tuition will benefit students in a number of ways, including:

- ✓ Increased clarity and transparency about the out-of-pocket cost of tuition.
- ✓ Simplified payment process – payments will be made directly to institutions by OSAP on students behalf.
- ✓ Improved financial planning for students and their families.
- ✓ More informed postsecondary education decision making.

# Continuous Simplification



## OSAP integration with university and college applications

- On November 29, the university and college application centres provided direct links for students to register on the OSAP website for students applying to college and/or university 2017-18 financial aid.



- Students selecting the link from the application centres are directed to a special landing page where they are able to register for OSAP. In addition, the college application centre is passing OSAP profile information so that a student does not need to re-enter this information on the OSAP site.
- Students coming from the application centres are advised that the OSAP application for 2017-18 will be available in the spring of 2017 and OSAP will send them an email when the application is available.
- A link to a new planning tool is available from the new OSAP landing page allowing students to get a broad estimate of the amount of funding they may be eligible for.



# A new online tool

**Get ready for 2017-18**  
Find out how much of your tuition, fees and more could be covered by OSAP.

**Tell us about you**

Currently in high school ▾

Married/common-law student

Student has  children

Parental income  [help](#)


Will go to

university

college

private career college

Will live with parent/guardian

 **You could get free tuition**

Your OSAP funding would pay for tuition and more

<b>Grants (you keep)</b> \$8,700	<b>Loans (you pay back)</b> \$7,100
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How much school could cost

Tuition \$6,500	* *	Living expenses \$9,700
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Fees: \$1,000. Supplies: \$1,700.

Your contribution

You need to help pay for your postsecondary education. You need to pay:  
\$3,000 (through savings, work, etc.)

California Student Aid Commission

- ✓ A new, easy-to-use tool to help students find out how much grants and loans they could be eligible for under OSAP in the 2017-18 academic year.
- ✓ Available online at [ontario.ca/osap](http://ontario.ca/osap)
- ✓ Launched on November 25, 2016 – already used over 100,000 times!





# Communicating the changes



# Communicating the changes

The introduction of the Ontario Student Grant will result in **Free Tuition and No Ontario debt** for:

- Dependent students with annual family incomes less than \$50,000.
- Married students with annual family incomes less than \$50,000.
- Sole-support parents with annual family incomes less than \$50,000.
- Independent students with annual income less than \$30,000.

Students with incomes above these amounts will receive a mix of grant and loan from the Ontario government. As income increases, the share of aid that is non-repayable grant scales downwards.

Note: While many students will incur no provincial debt, part of a students' federal support is likely to include loan.

# Communicating the changes

**NEW!**

The changes to OSAP will make tuition free for thousands of students and reduce the cost for many more.

**Free tuition = grants from OSAP that exceed the cost of average tuition**



More than 210,000 students will receive free average tuition



4 out of 5 OSAP students with family incomes below \$90,000 will receive free average tuition



Nearly 85% of OSAP students will receive more grants

# Communicating the changes

We have initiated a marketing and social media campaign to communicate the changes to the public.

See  
what your  
child may  
qualify for.



# Communicating the changes

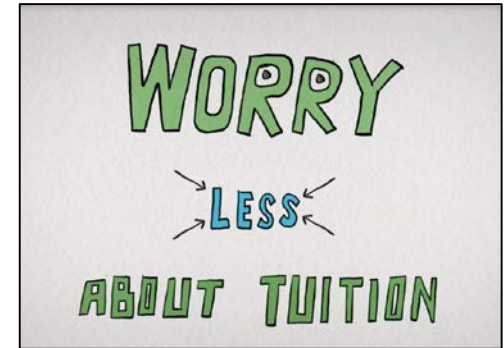
How much can you get?  
Search OSAP



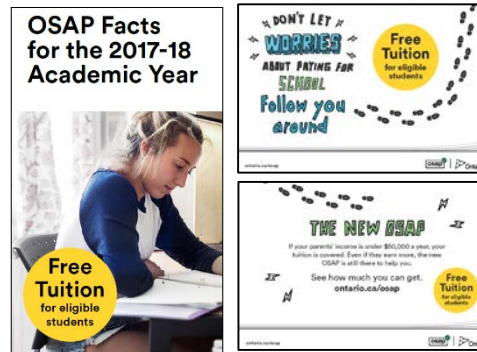
Snapchat



Facebook



Instagram



Kits



Twitter



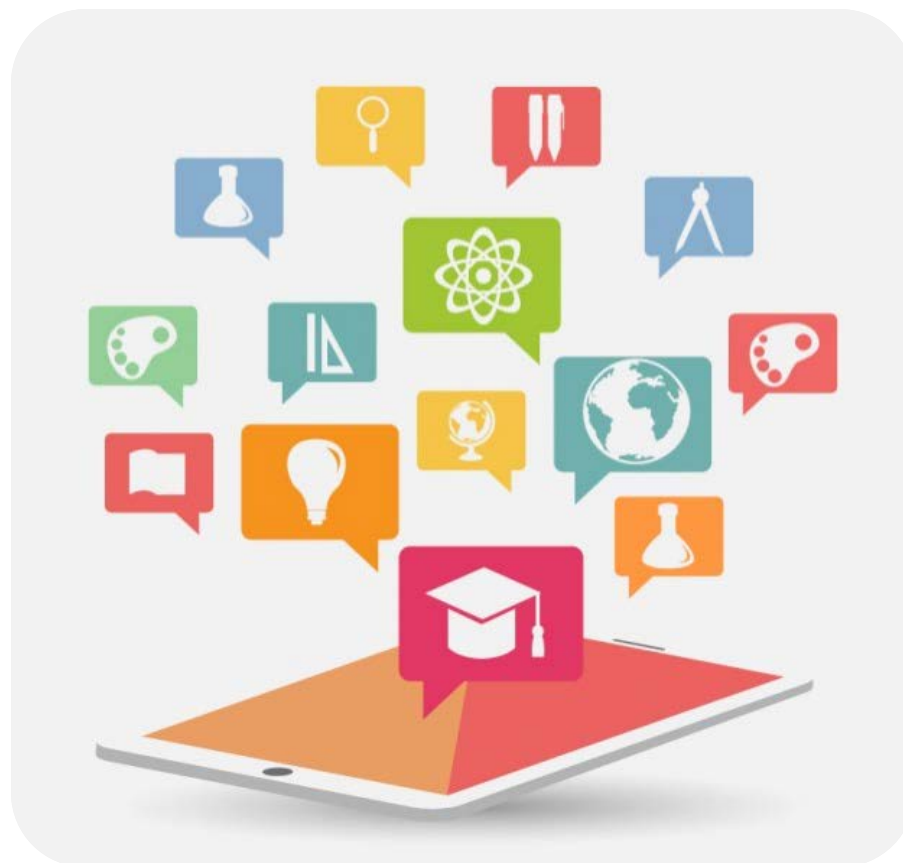
# Lessons Learned

- Two-phased approach
- Stakeholders were involved early in the process and throughout the process
- Develop and manage IT system in house
- BIG buy-in from top levels of government

# Questions?



## The Role of IT in Delivery of Client Centered Services



## Objectives

## I&amp;IT Function in OPS

I+IT

Community  
Services I&IT  
Cluster (CSC)  
at a Glance

## A selected case study - OSAP



- How to Bring an essential government service to 21<sup>st</sup> century clients.

# Objectives

Overview

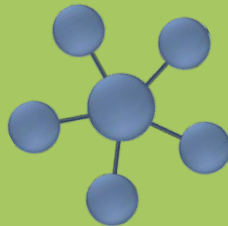
I&IT Function in OPS, Role of CSC

Overview of the Community Services I&IT Cluster within the context of the OPS

## CSC AT-A-GLANCE

... Is the I&IT partner with **six** ministries, **65** programs, **29** divisions and **110** branches. This includes the ministries of:

- Advanced Education & Skills Development
- Citizenship & Immigration
  - ❖ Ontario Seniors' Secretariat
  - ❖ Ontario Women's Directorate
- Education
- Housing
- Municipal Affairs
  - ❖ Ontario Growth Secretariat
- Tourism, Culture & Sport
  - ❖ Ontario150 Secretariat



...Partner ministries represent approximately **30%** of the Ontario Government's budget.



...Is managing an investment of approximately **\$130M** in FY 2016-17.



...Consists of **333** full-time equivalents, who are distributed across four branches and the Office of the Chief Information Officer.

...Offers **seven** business solutions platforms:

- Case Management
- Data Collection Framework
- Enterprise Business Intelligence
- Financial Management Administration
- Grants Management
- iACCESS
- Integrated Workplace Mgt.



...Manages **139** Applications.



.. delivered **221 projects** between 2010 and 2016. **74%** of projects were delivered on time or early and **92%** were on or under budget

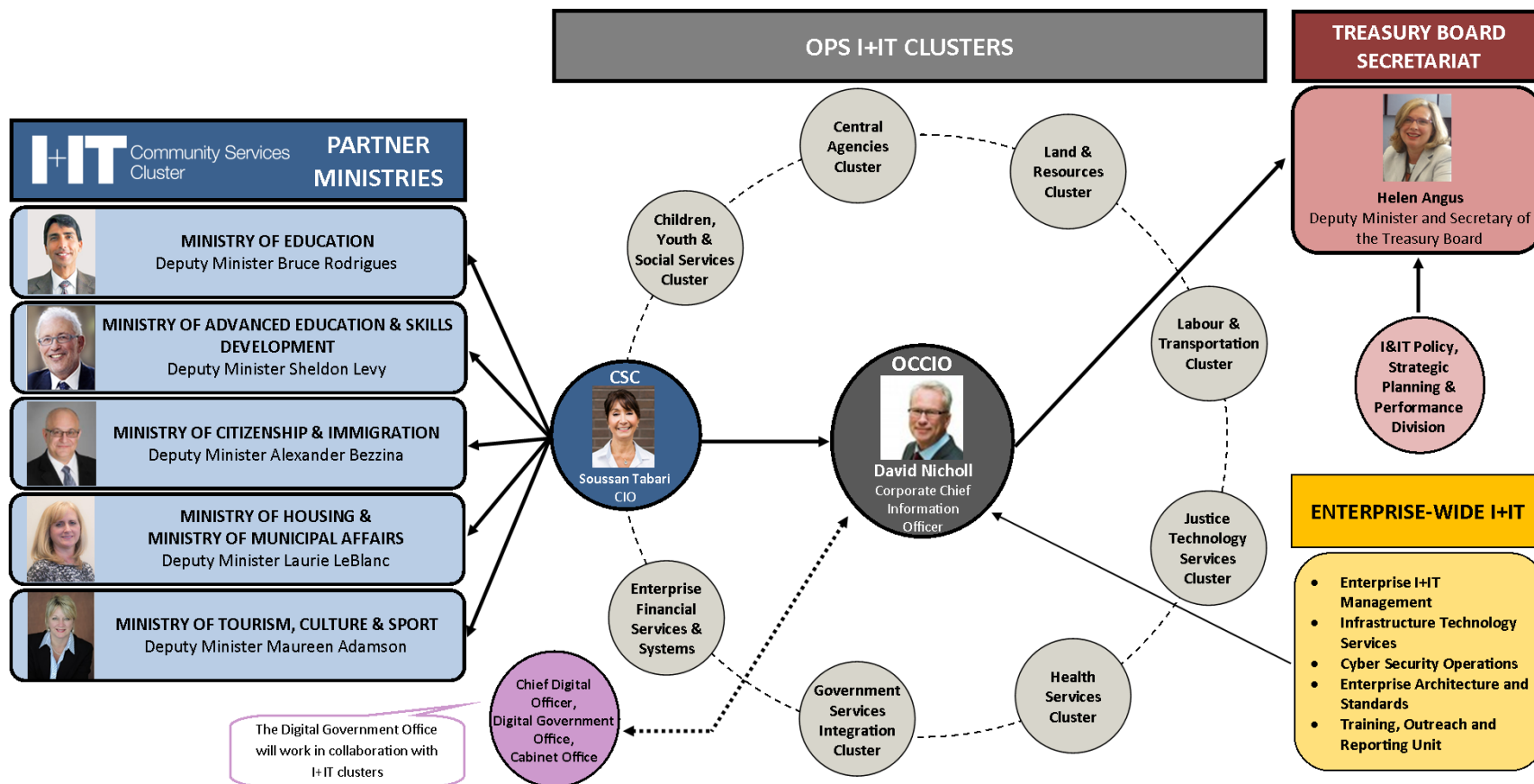


...Led the creation of a **mobile application development strategy** for the province.



...Is one of **nine** I&IT clusters within the OPS and reports to the Deputy Ministers of its partner ministries, as well as to the Office of the Corporate Chief Information Officer (OCCIO).

# CSC Reporting relationship – A True Horizontal Matrix



# Objectives

Overview

I&IT Function in OPS, Role of CSC

Introduction

**Make a Case, Sell Your Case**

## Case for action - Why do we need a new OSAP system?

5 different, specialized organizations, using five distinct instruments, assessed the risks associated with the legacy environment:



A system review by KPMG, using a 16-criteria risk assessment.



An infrastructure review by Infrastructure Technology Services (ITS) for hardware, network, connectivity, system management and operating software.



A vulnerability assessment by Cyber Security Branch.



A security and data integrity audit by the Internal Audit Branch.



A corporate risk assessment framework to assess all OPS systems.

Regardless of the scope and methodology, all 5 assessments unanimously identified critical risks.



## How to sell a Business Case?



## What made the case to the decision-makers?

1. Identifying opportunities for a modernized business model. e.g. online, real time access for students, reducing paper work for administrators, harmonizing and integration of funding instruments.



2. Return on Investment (ROI).



3. Tying the modernization of transactional functions to creation of reliable and timely data for decision making.







4. Finding the strategic champions.



**Thus the project is NOT about new technology but about a 21<sup>st</sup> century business model and better outcomes.**

## Our Vision

In a 6-year journey, the ministry team consisting of Policy, Program, Front Line Delivery, I&IT Cluster fundamentally transform the student assistance services.

Dimensions	From	To
Process 	Labour intensive Manual Paper heavy	Fully automated Fast turn around Paperless
Data 	Limited data, security of personal information at risk	Reliable, authoritative data for evidence-base decision making accessed by traceable roles
Technology 	Obsolete, 20 years old	Best of breed integration of latest products on a scalable platform
People 	Blurred lines; obsolete skills	Clear and distinct roles/ responsibilities; modern competencies

# Objectives

Overview

I&IT Function in OPS, Role of CSC

Introduction

Make a Case, Sell your case

**OSAP Transformation**

How to bring an essential government service to 21<sup>st</sup> century clients.

## What's the secret?

Many attempts to modernize a complex set of services similar to OSAP often encounter such large obstacles that either the initiative is aborted or the scope reduced to tactical improvements rather than a fundamental transformation.

Most, if not all, of what I am sharing are **textbook** instructions, repeatedly stated as the recipe to success.

The essence of this discussion is to share with you what makes the difference between an idea that is conceptually a “no brainer” versus a secure landing on terra firma; i.e. the way in which one **executes** the textbook best practices.

Here are **5 tips** in priority order that guided us to a complete overhaul of OSAP and a 21<sup>st</sup> century style of service delivery

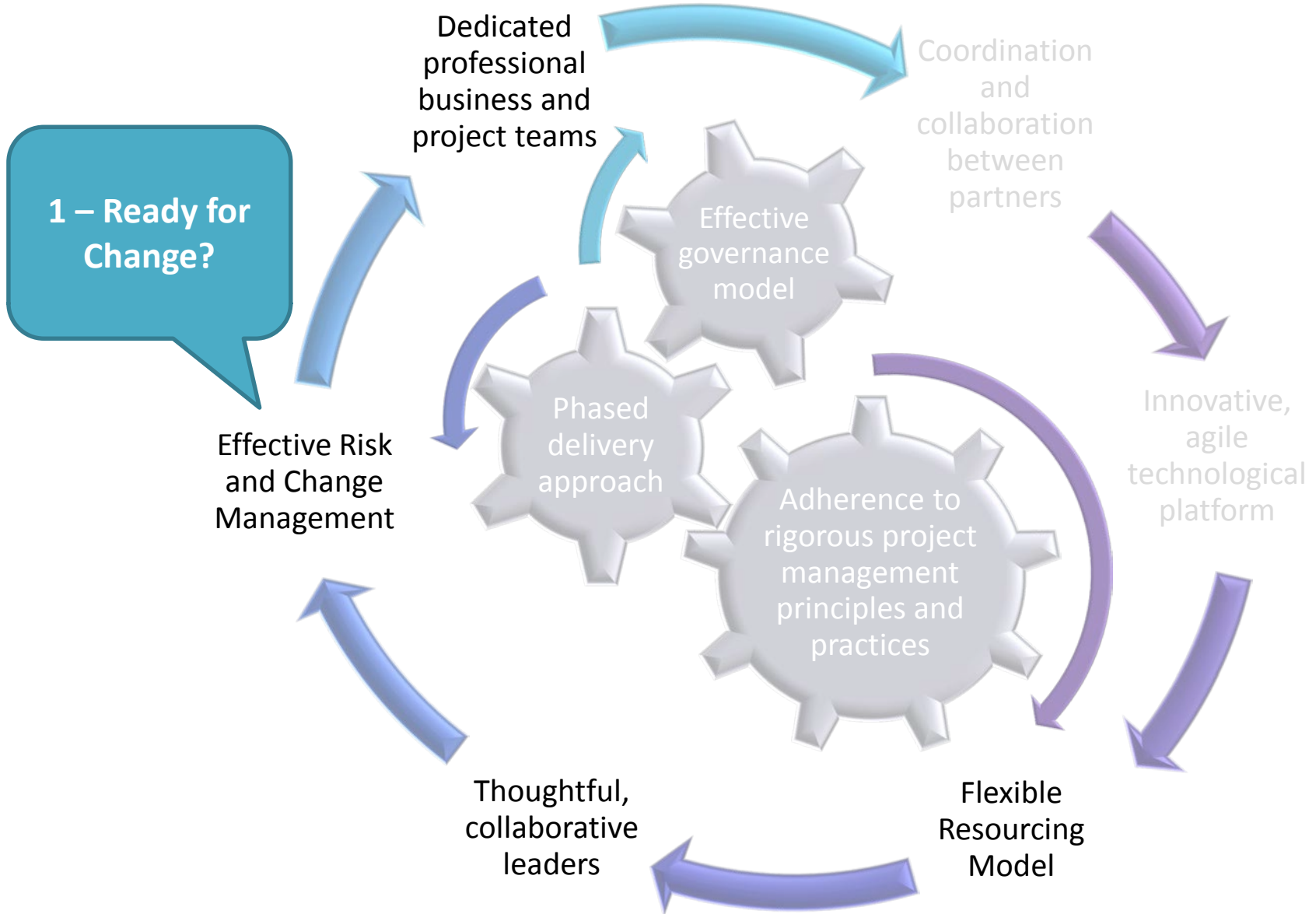
**ON BUDGET**

**with EXPANDED SCOPE, and**

**EXTENDED TIME** adjusted for introduction of new programs



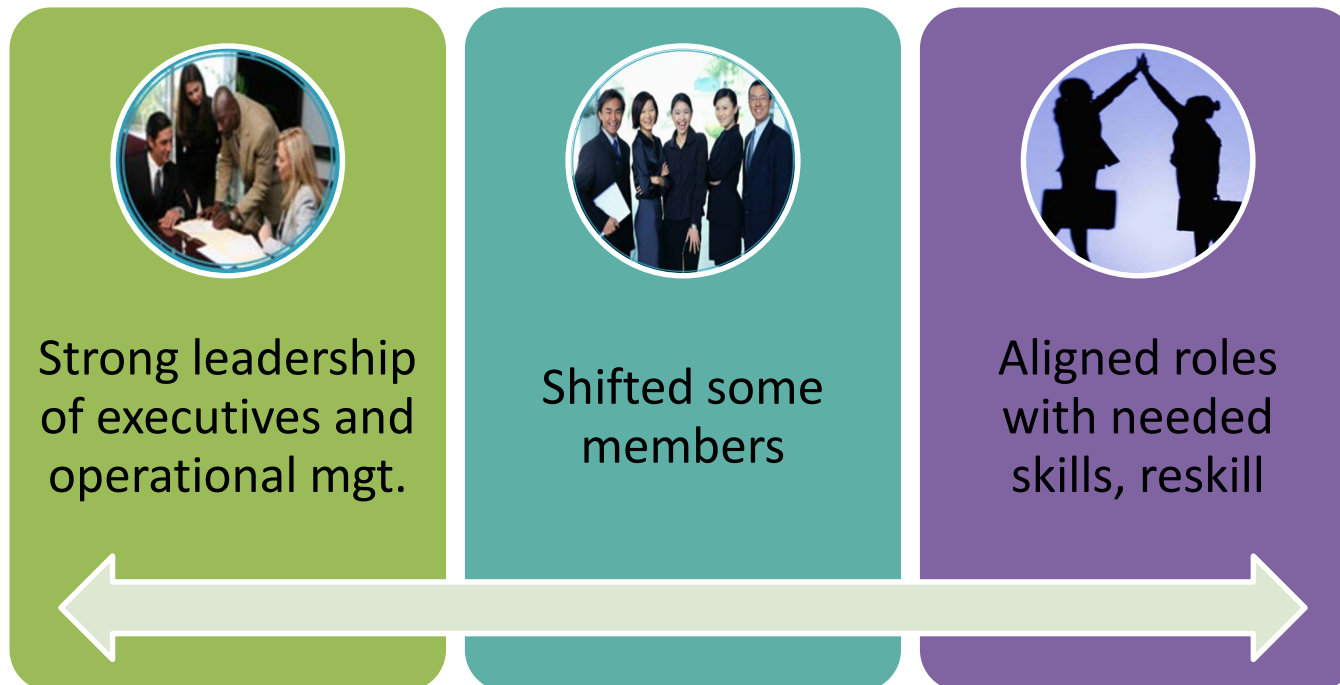
# So the Business Case is approved – Now you have to deliver!!



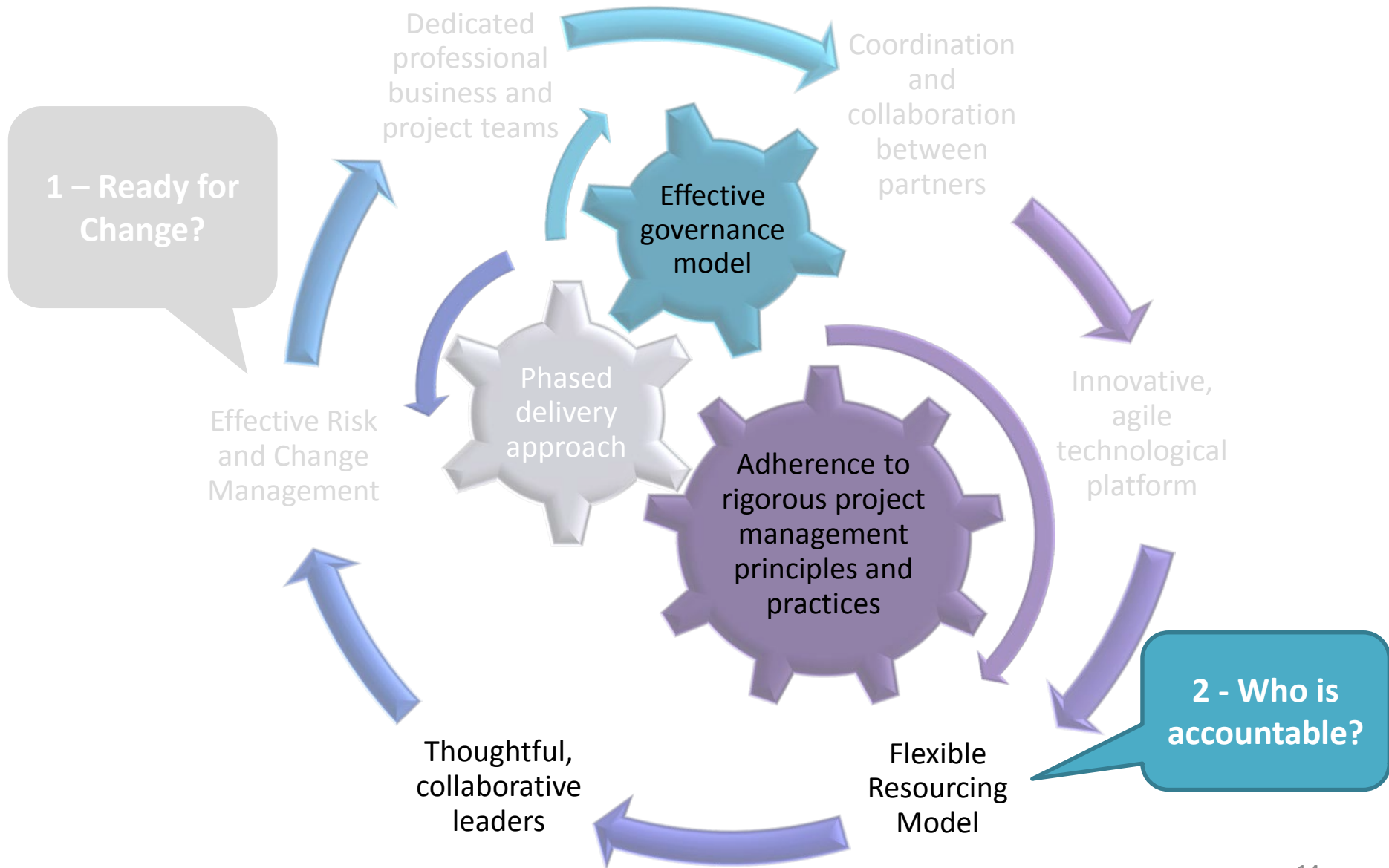
## 1. Ready for Change – Truly!

Many past assessments, system reviews, audits had determined that OSAP processes & service model were in need of modernization and the obsolete technology was a serious risk.

### What did we do about it?

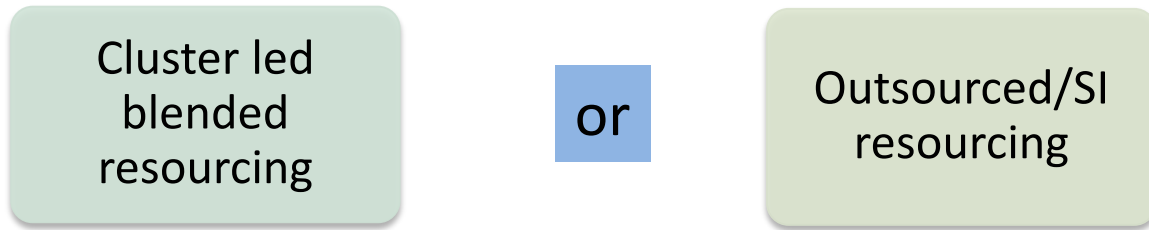


# So the Business Case is approved – Now you have to deliver!!





# 2. Resourcing model - Do you know who's accountable?



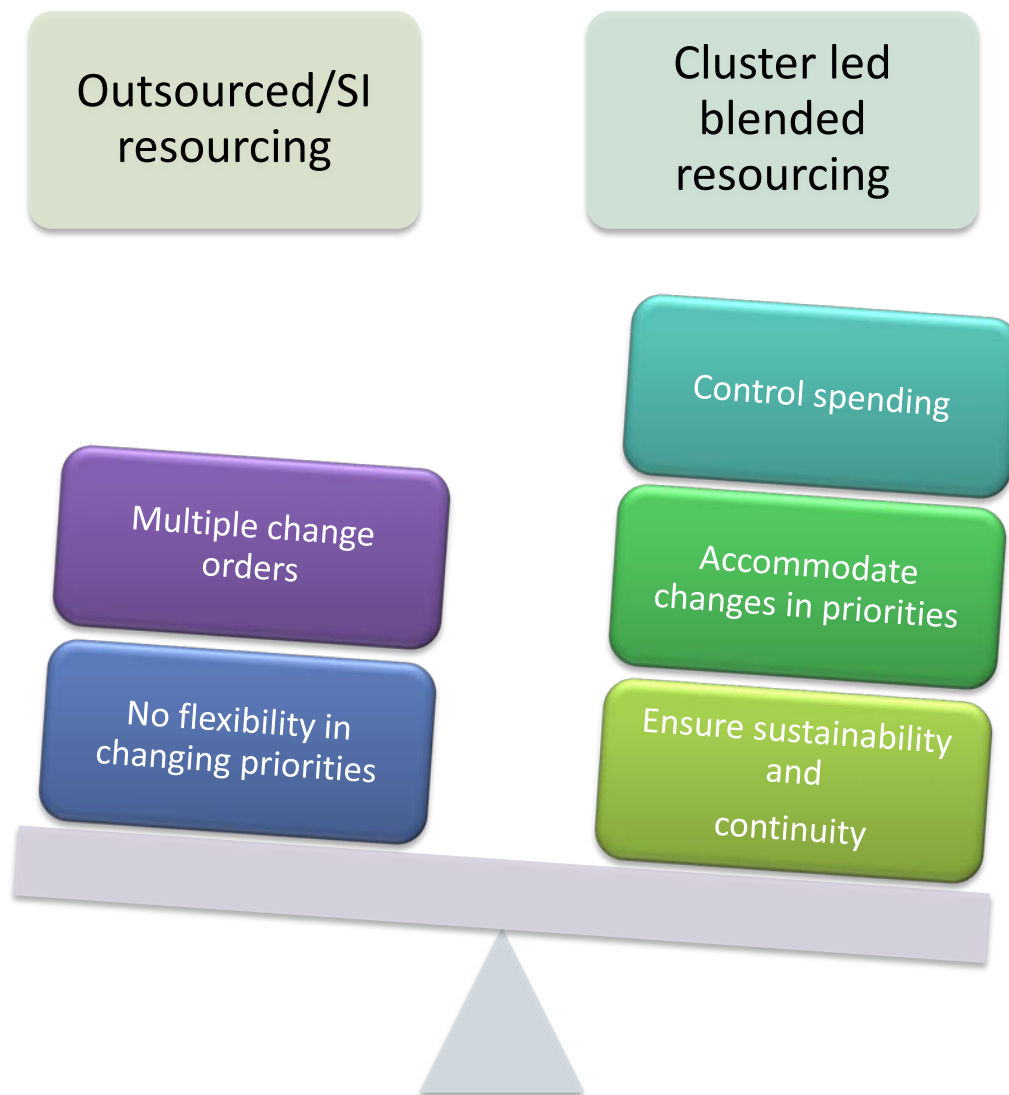
Cluster Team responsible for critical IT roles

- Setting the direction
- Providing oversight
- Selecting the solution
- Controlling the quality of the products
- Traceability of requirements
- System integration
- Rigorous project management

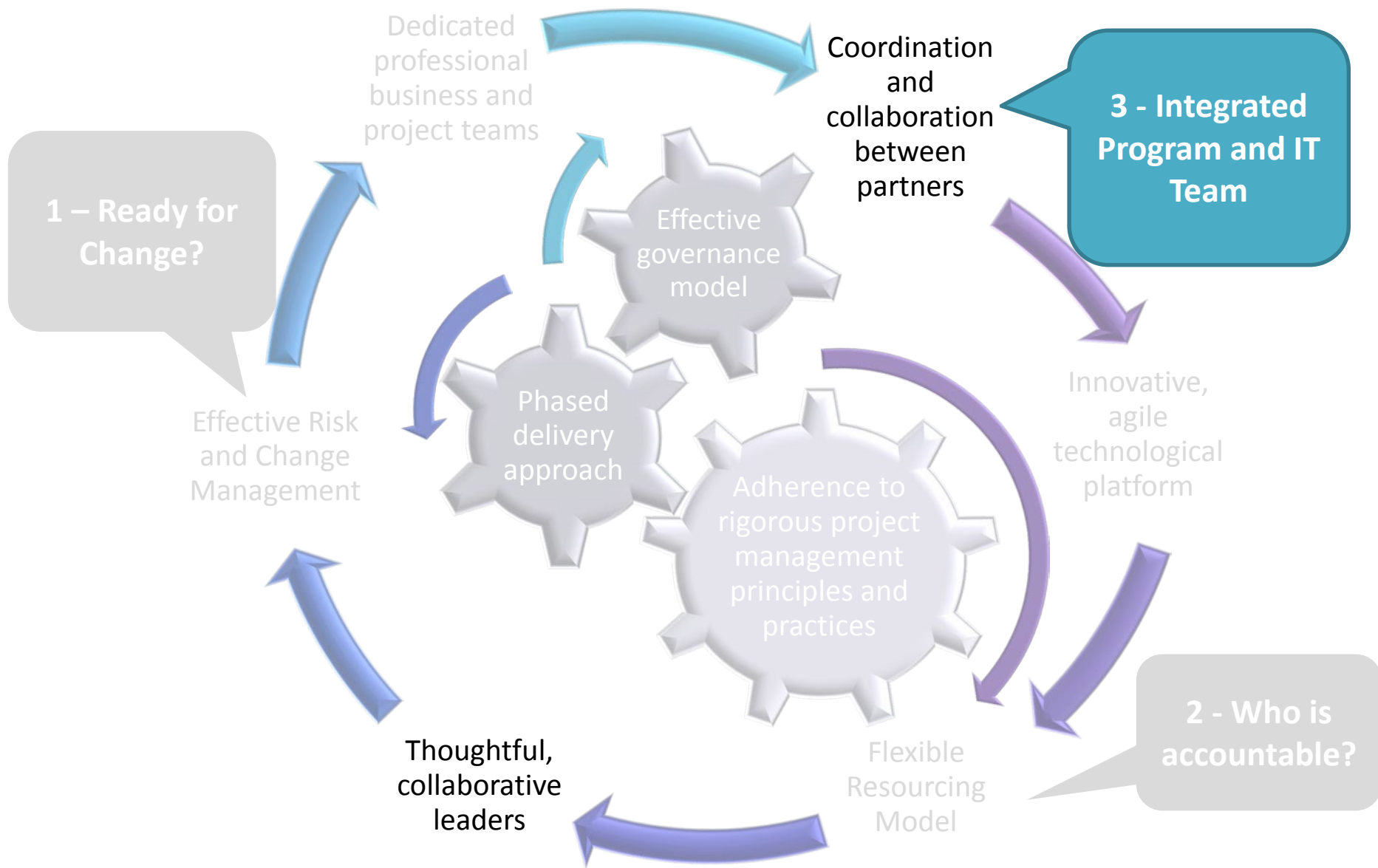


VOR technical capacity      VOR technical capacity

## 2. Resourcing Model – Do you know who is accountable?



So the Business Case is approved – Now you have to deliver!!



### 3. Integrated Program & IT Team: Clear & distinct duties in the presence of major change



#### Reciprocal idea exchange

Openness to each other's ideas on architecture

IT offering ideas of process improvement/simplified workflows

Program experts demanding user experiences similar to commercial standards



#### A trusted relationship

Assumption of integrity

Sharing common goals

Clear performance metrics to assess progress and results



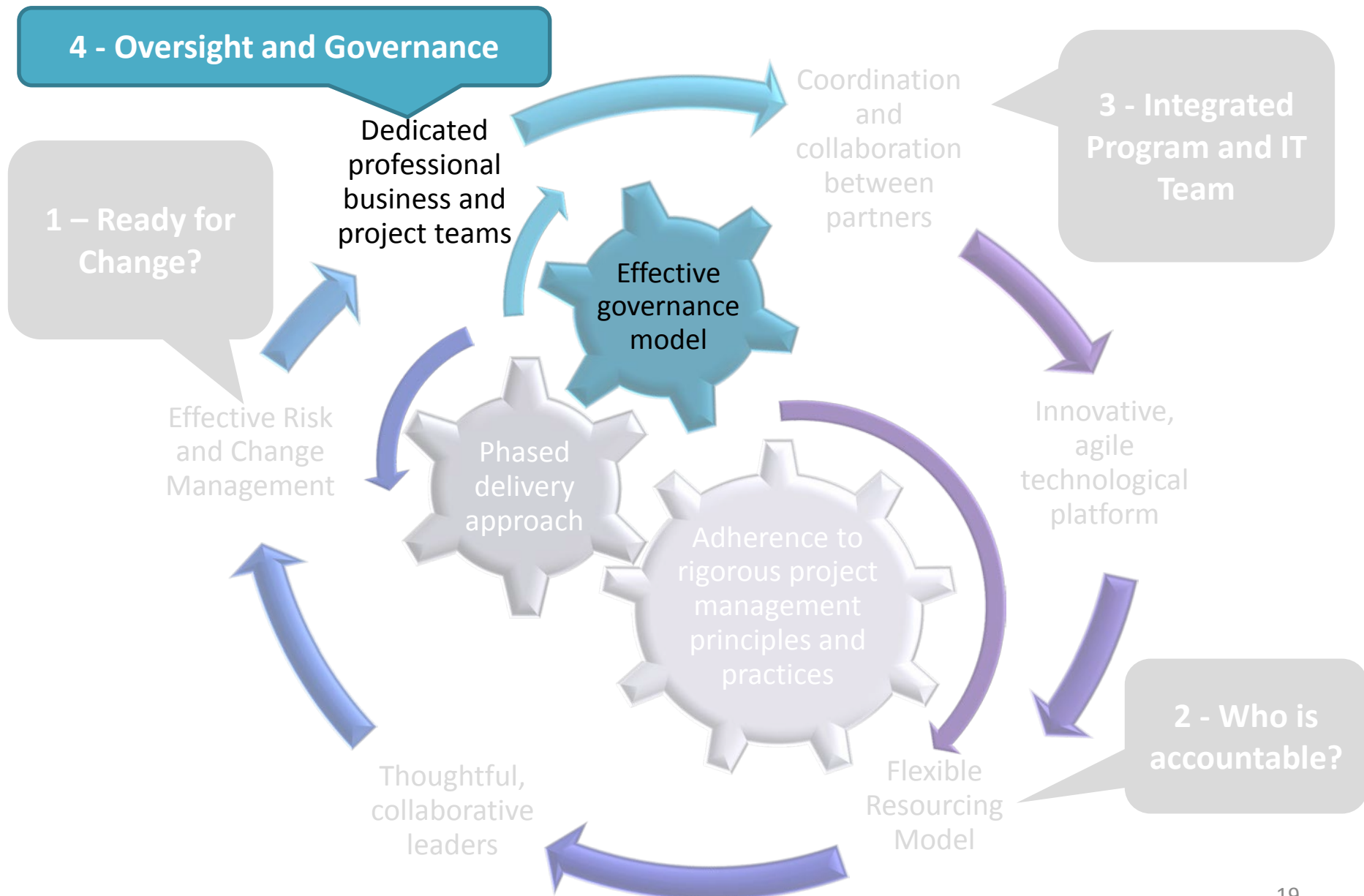
#### A multi-disciplinary team

In the course of the project, the team matured to what the 21st century digital world will demand, which is one of complete **integration of competencies** and **sharing of risks and outcomes.**



So the Business Case is approved – Now you have to deliver!!

**4 - Oversight and Governance**



1 – Ready for Change?

Dedicated professional business and project teams

Coordination and collaboration between partners

3 - Integrated Program and IT Team

Effective governance model

Innovative, agile technological platform

Effective Risk and Change Management

Phased delivery approach

Adherence to rigorous project management principles and practices

2 - Who is accountable?

Thoughtful, collaborative leaders

Flexible Resourcing Model

## 4. Oversight/Governance – like or not you need discipline



Keeping a project with simple scope and short duration on time and budget is fairly easy.

Modernizing an extremely complex business model like OSAP over a period of five years, where numerous priority changes happen, is akin to changing the engine of a jet airplane while in flight at 800 km/h, up 10,000 m in the air without dropping the passengers!!



- Especially necessary in relation to daily operational activities

Rigours Project  
Mgt.

Recognizing  
heavy work load

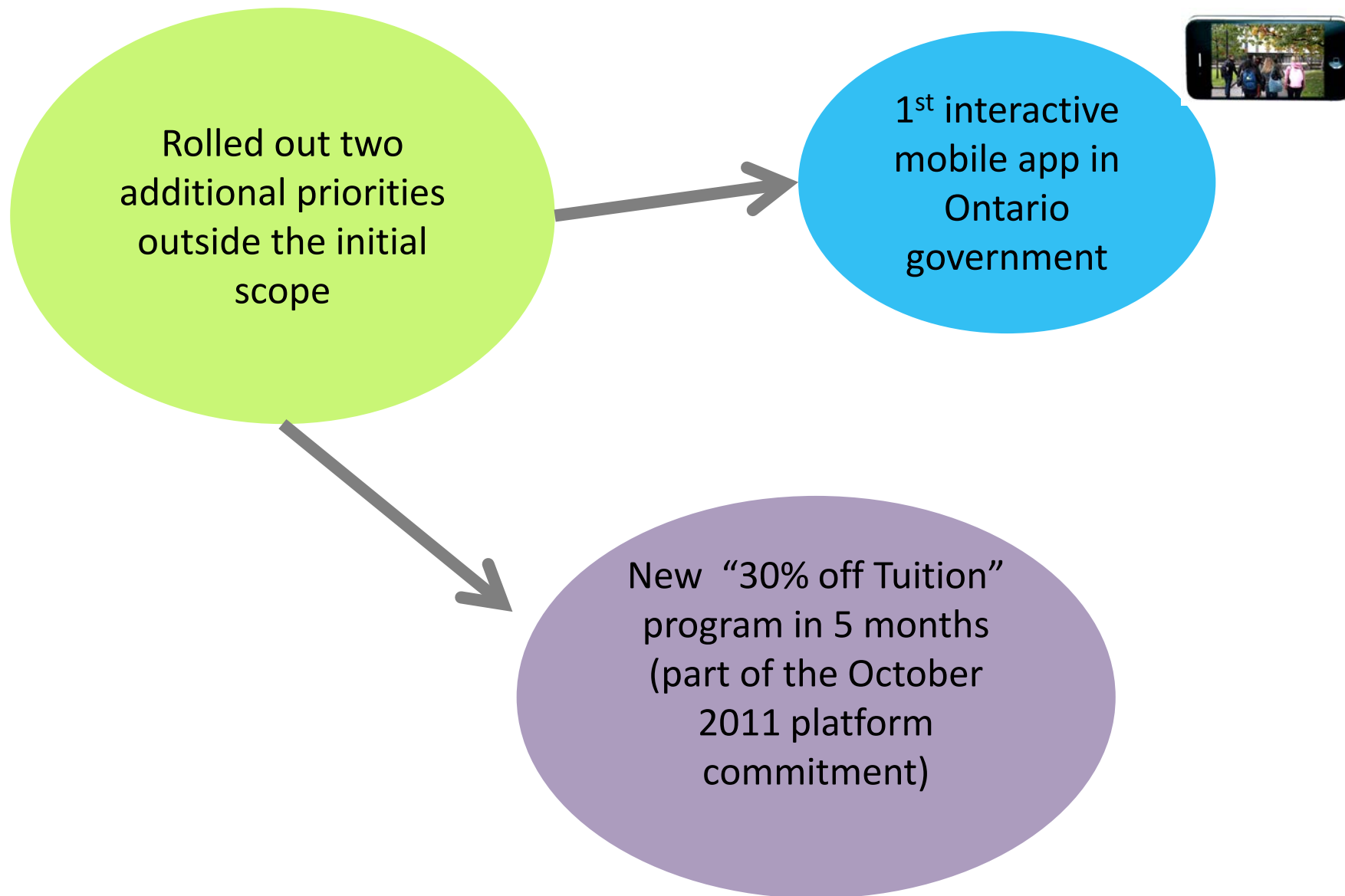
- Need for juggling multiple tasks within tight timelines
- Consulting/trusting each other's judgment in reprioritizing work packages



- Regular & frequent status reviews to provide guidance
- Correcting the path before getting too far off the track
- Escalating where all other avenues were exhausted

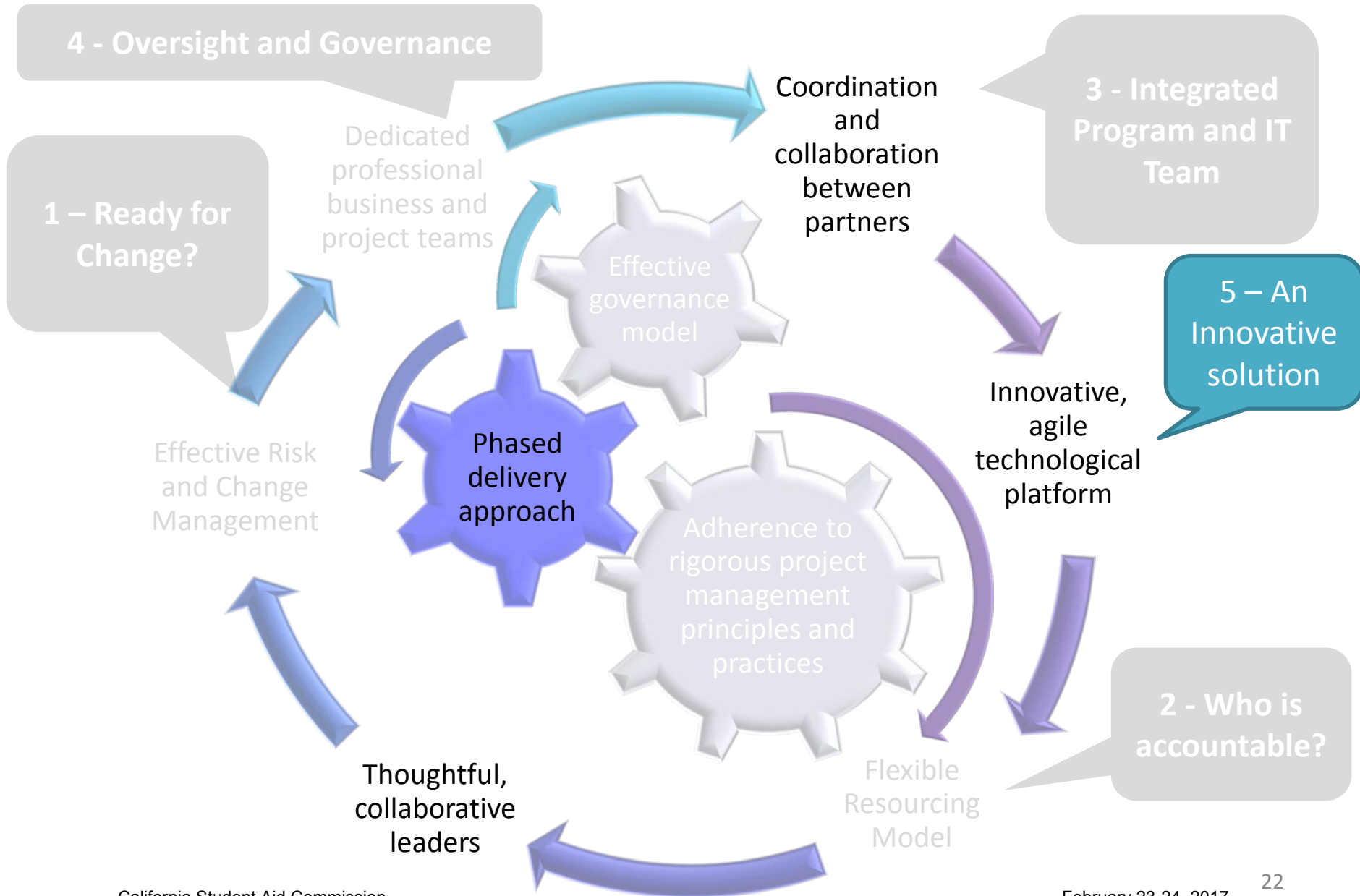
Paving the road

## 4. Oversight/Governance – like or not you need discipline





# So the Business Case is approved – Now you have to deliver!!



## 5. Last but not least – the solution – a serious innovation

Often innovation is equated with an original idea that makes a tremendous net new impact. But innovation is also applying the existing to gain new values. The technical solution enabling OSAP is not unique, but the end result is remarkably **innovative and agile**.

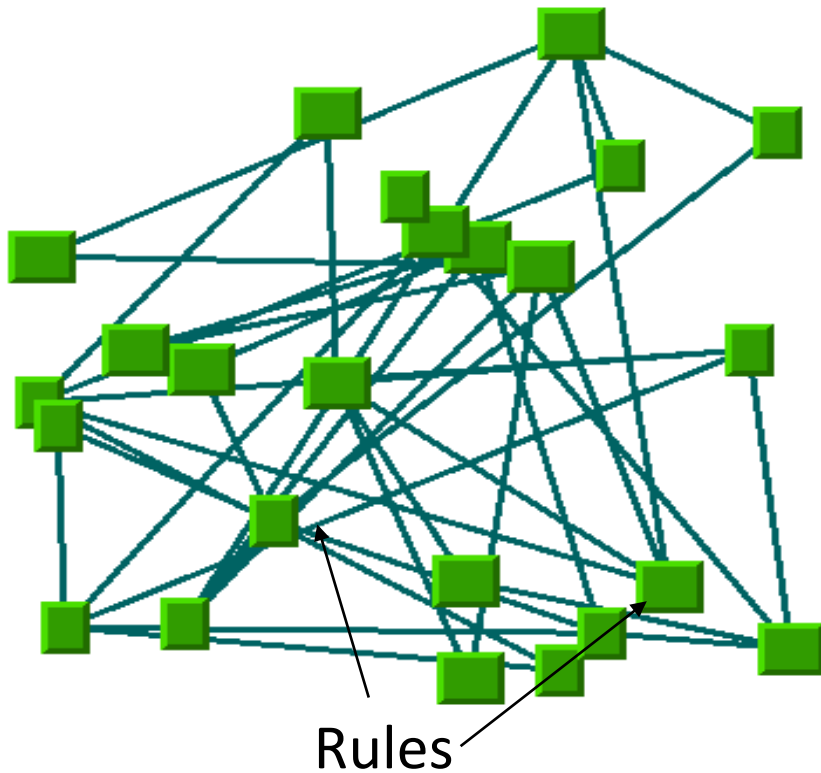
We conducted a market assessment through an RFI to the vendor community, jurisdictional scan. No single COTS (commercial off the shelf solution) could accommodate OSAP business requirements.



## The Change

From Chaotic...

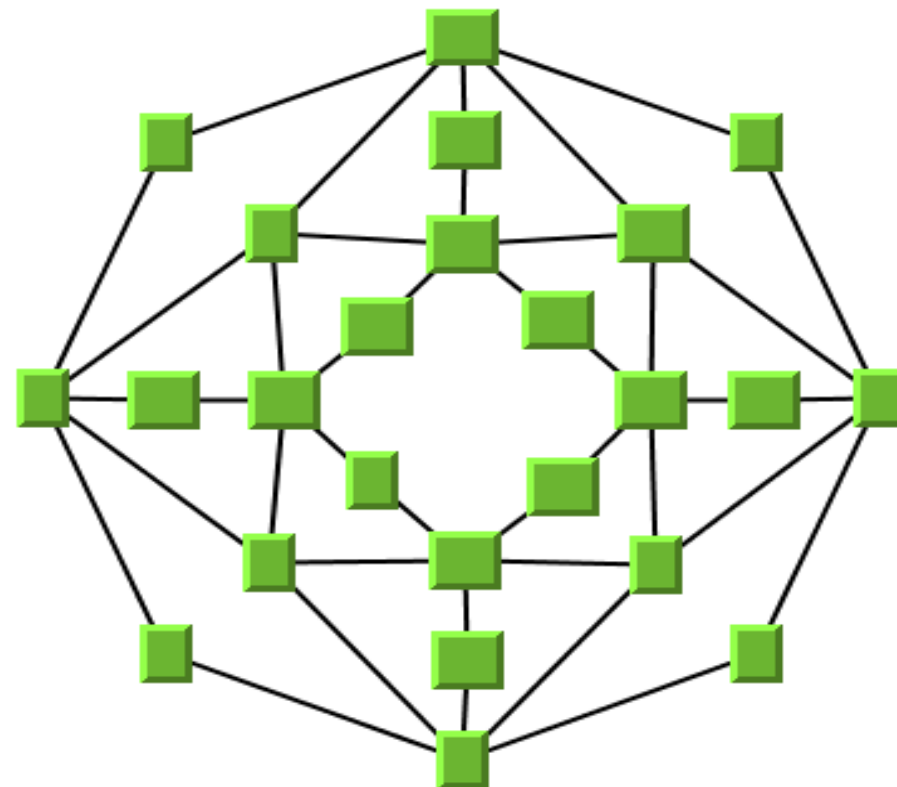
Rules embedded in Code



Three different instances of rule sets maintained separately

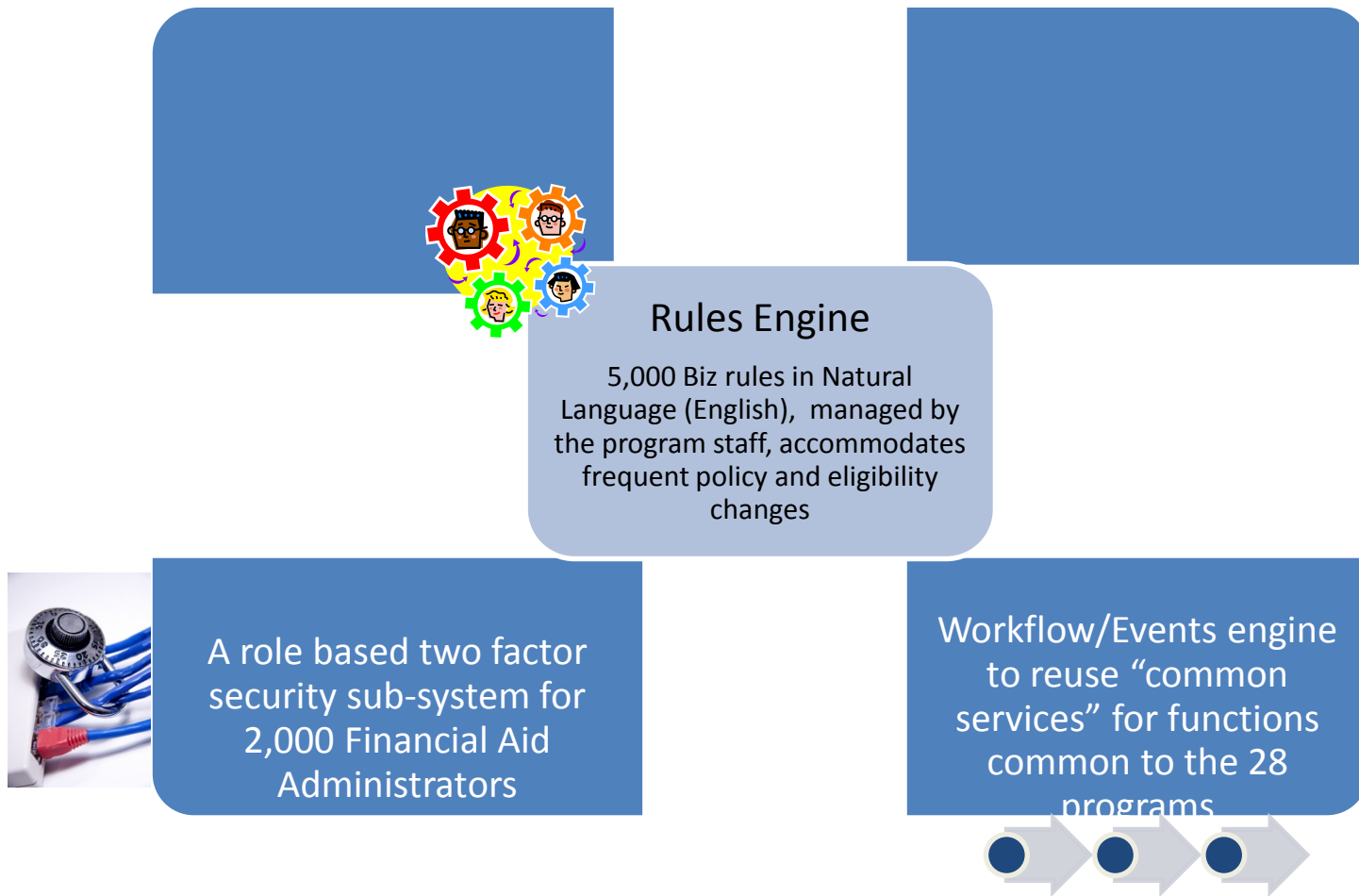
To Structured and Orderly...

Externalized Rules

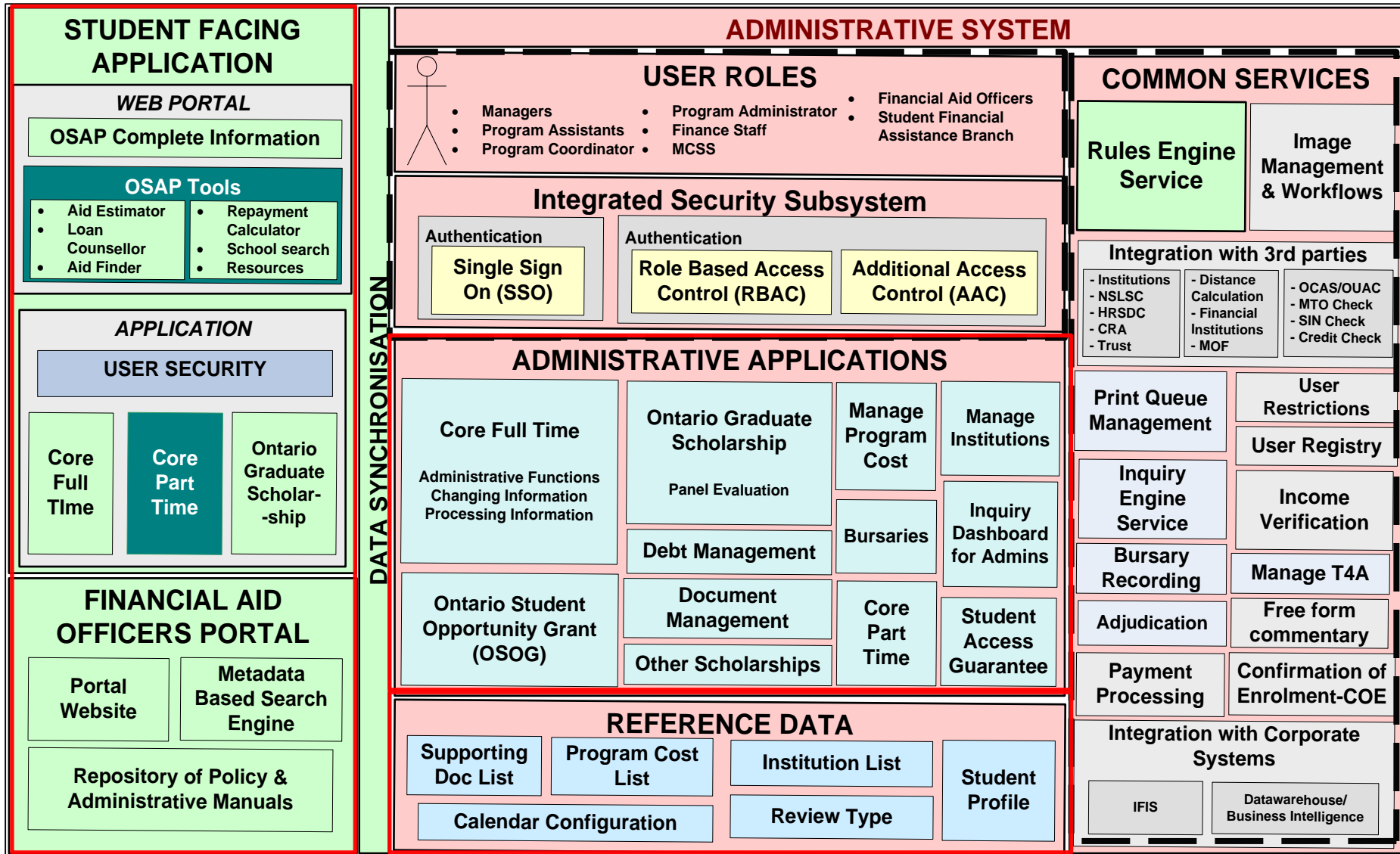


Single externalized rules engine

# 5. Last but not least – the solution – a serious innovation



# OSAP Modernization- iACCESS Platform

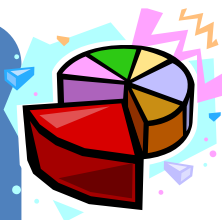


# 5. Last but not least – the solution – a serious innovation



A web Content Mgt. and Imaging tool (equivalent of 40 million pages)

A Business Intelligence component for Analytics



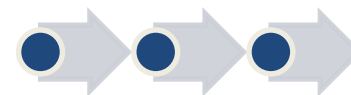
## Rules Engine

5,000 Biz rules in Natural Language (English), managed by the program staff, accommodates frequent policy and eligibility changes.

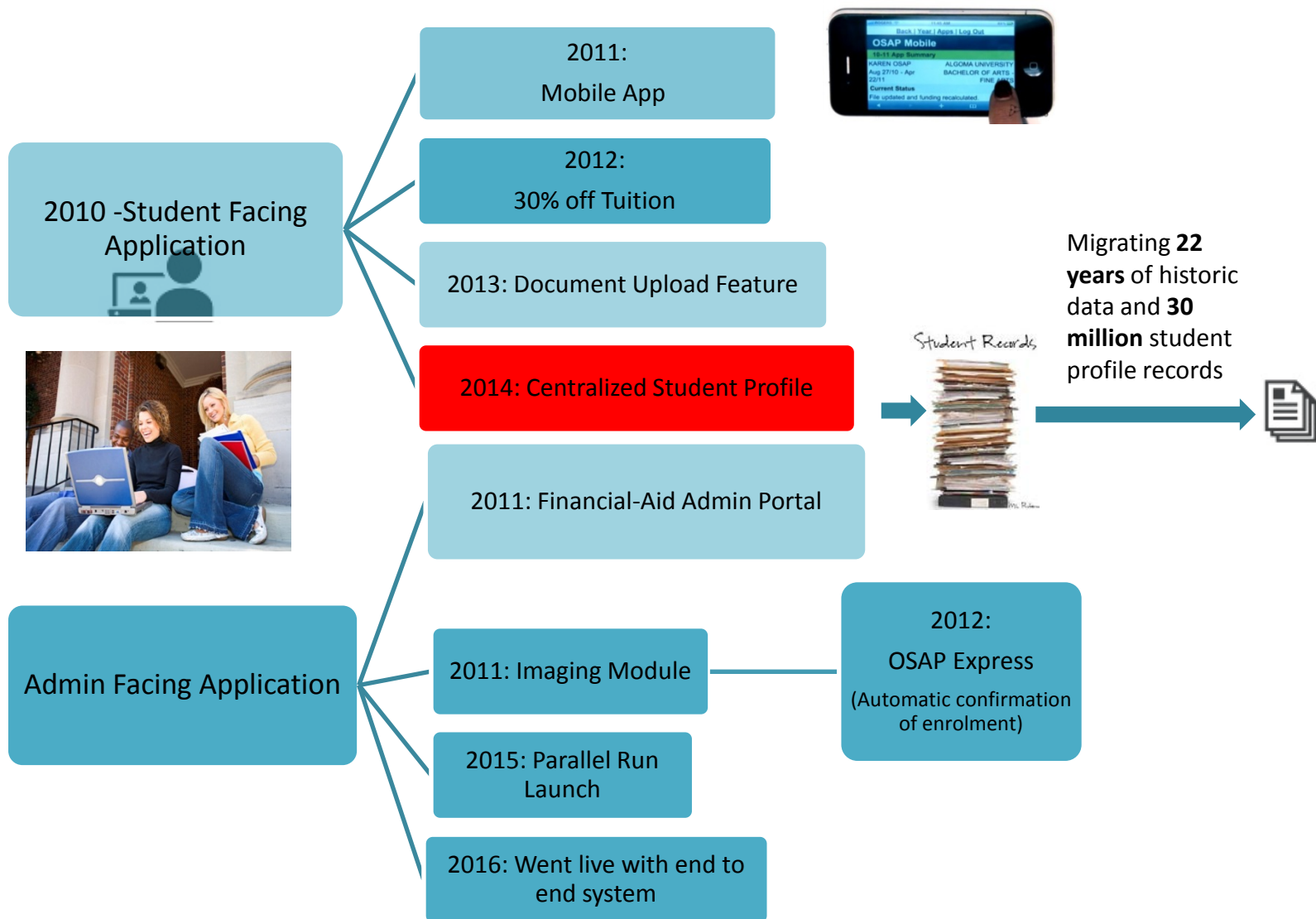


A role based two factor security sub-system for 2,000 Financial Aid Administrators

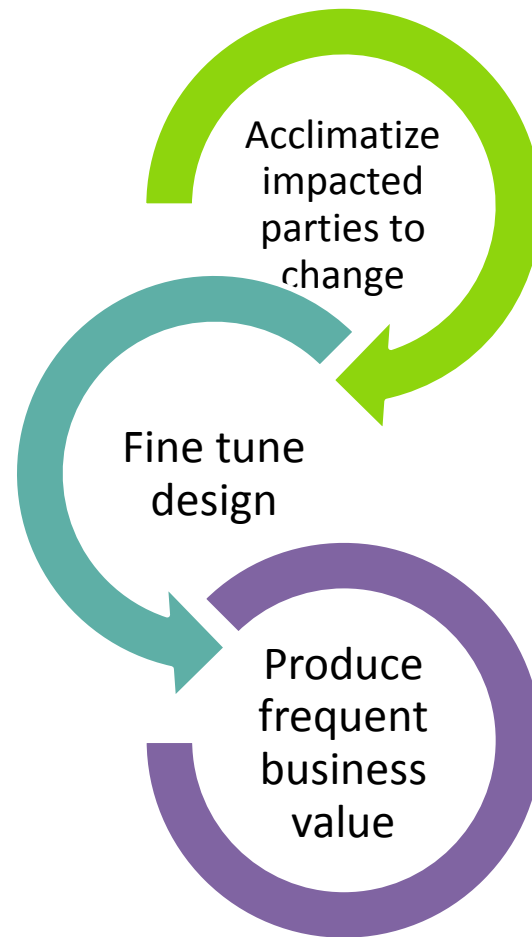
Workflow/Events engine to reuse “common services” for functions common to the 28 programs



# Incremental release through a phased approach



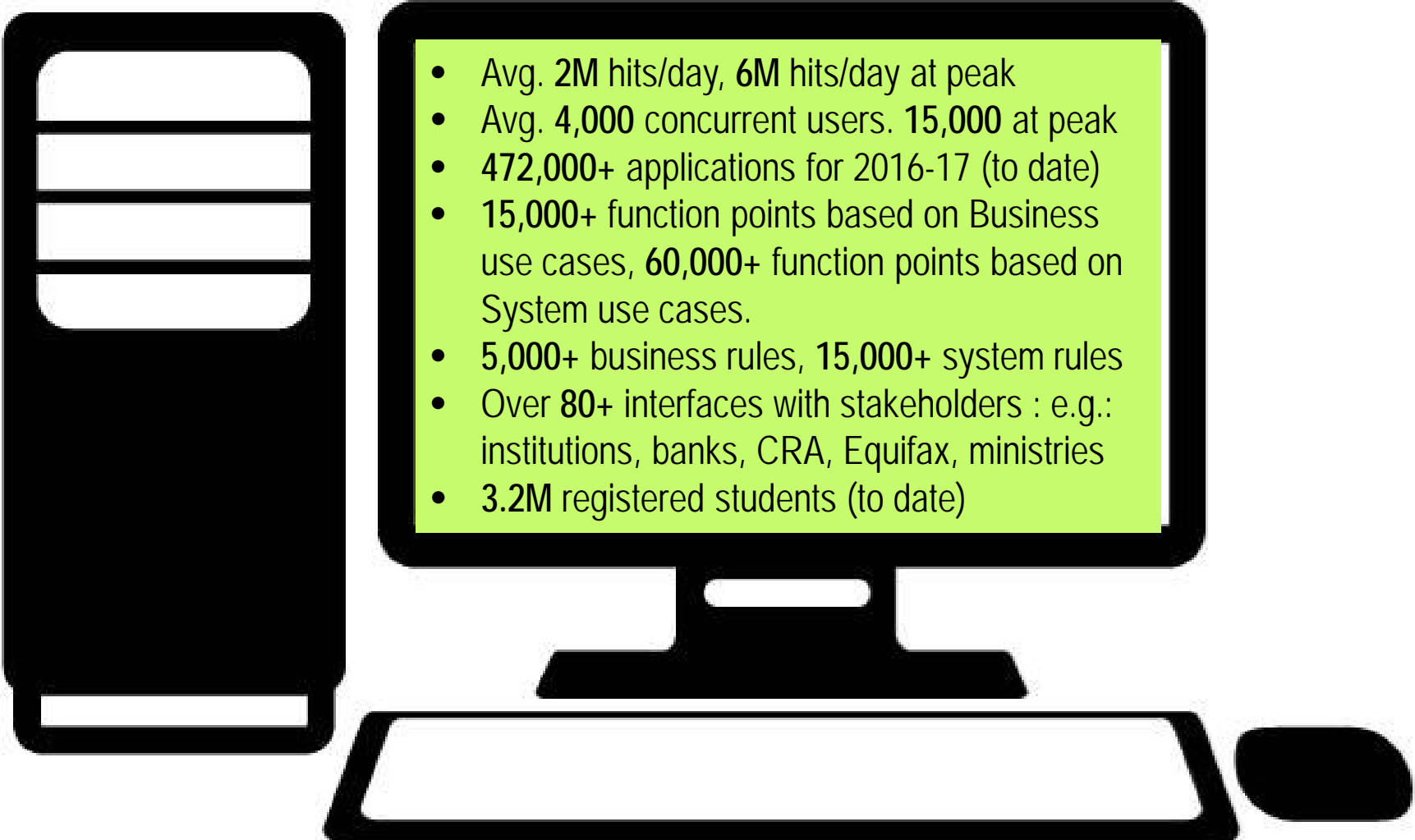
## Benefits of incremental release strategy







The most significant reason to plan and implement a phased approach is the unlikelihood of a large project successfully delivering through a big bang release.





# A few stats...

- 
- Avg. 2M hits/day, 6M hits/day at peak
  - Avg. 4,000 concurrent users. 15,000 at peak
  - 472,000+ applications for 2016-17 (to date)
  - 15,000+ function points based on Business use cases, 60,000+ function points based on System use cases.
  - 5,000+ business rules, 15,000+ system rules
  - Over 80+ interfaces with stakeholders : e.g.: institutions, banks, CRA, Equifax, ministries
  - 3.2M registered students (to date)

## Project Risks - Summary

Risk	Likelihood	Impact	Risk Mitigation
Change in government/ministry/ program priorities 	High	High	Seek commitment and approval from the program; regular reporting to the executive management  Implement rigorous change management to identify impact on cost and timelines
Cost / schedule overruns 	High	High	Agree on scope and freeze each release. Follow changes through formal change request process to ensure impact is identified and addressed as a part of overall change management process.
Data Migration / Integration Challenges 	High	High	Phased approach of migrating data. Multiple parallel runs and QA
Resource acquisition and retention 	High	High	Detailed resource planning to build and retain capacity and knowledge transfer over a long project duration

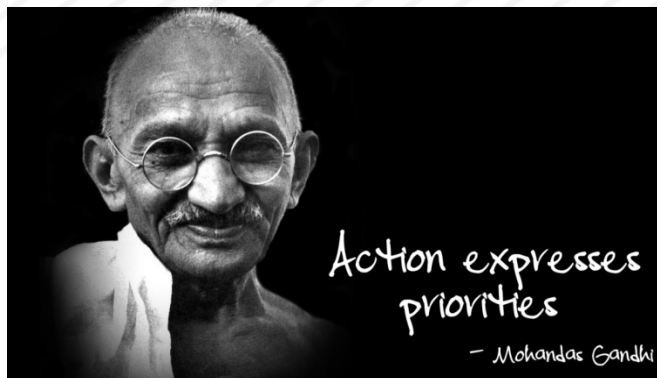
## Project Risks – Summary – (continued)

Risk	Likelihood	Impact	Risk Mitigation
<p>Technical integration with the legacy systems.</p> 	Medium	High	A complete impact assessment exercise to address known integration challenges through service identification.
<p>Impact on current operations</p> 	High	High	Implementation strategy to gradually transition from legacy to the new technologies with minimal impact on operations. Transition staff through appropriate training. Parallel run with existing technologies for a period of 6 months to ensure business continuity

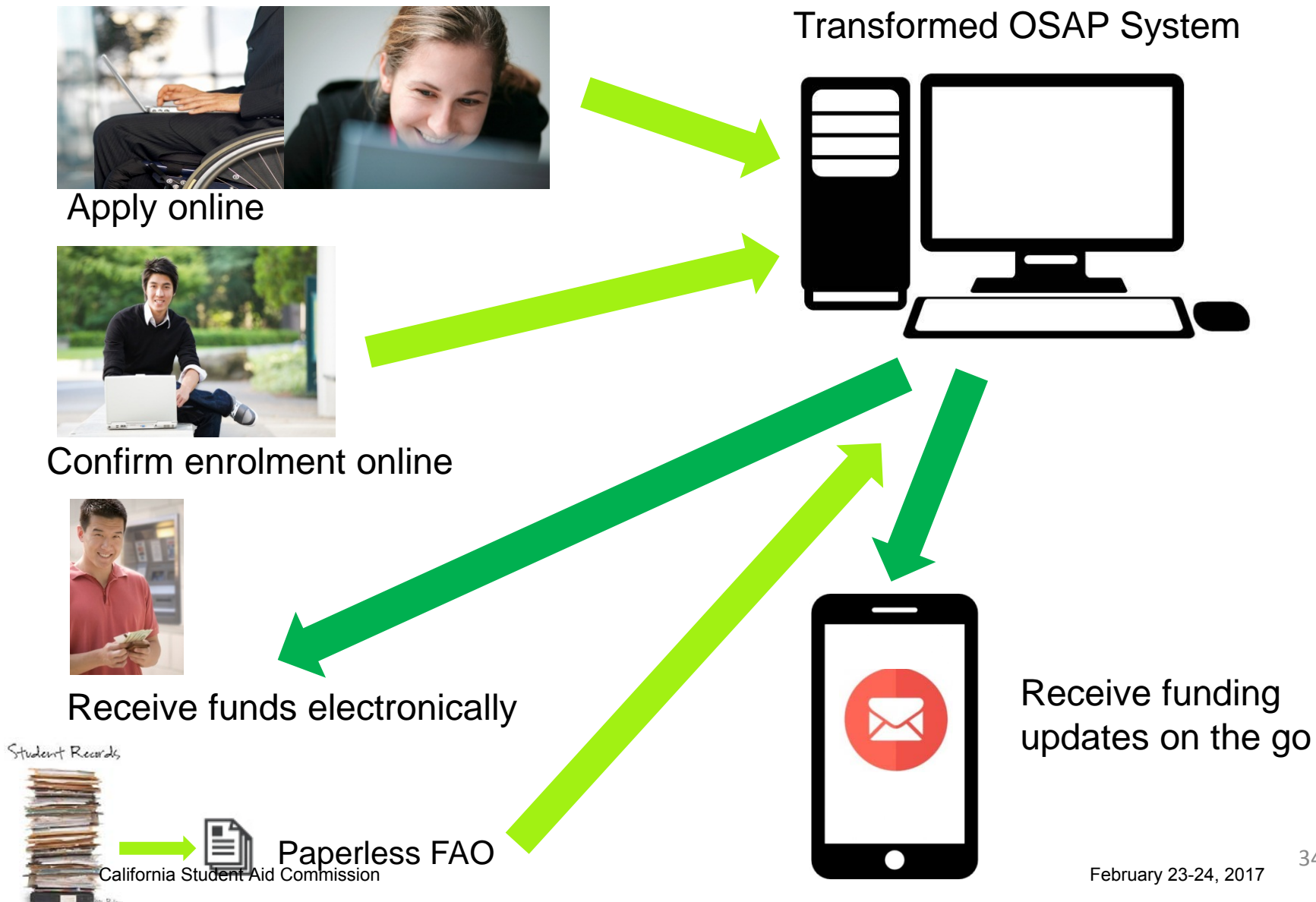
# Conclusion

Everything we  
did is in the  
**text book**

The secret is in  
the way one  
**executes the  
best practices!**



# The Outcome



1 Picture = 1,000 Words – Brock University , Sept 10<sup>th</sup>, 2012



## Twitter – What's trending

It's always a happy day when your OSAP comes in

That wonderful moment I go onto my online bank account and discover OSAP has fixed my whole being broke issue! [#ThanksOSAP](#)

OSAP IS HERE! I HAVE MONEY AGAIN!!

Woah, suddenly I have lots of money. Thanks extra OSAP money...and dad 😊

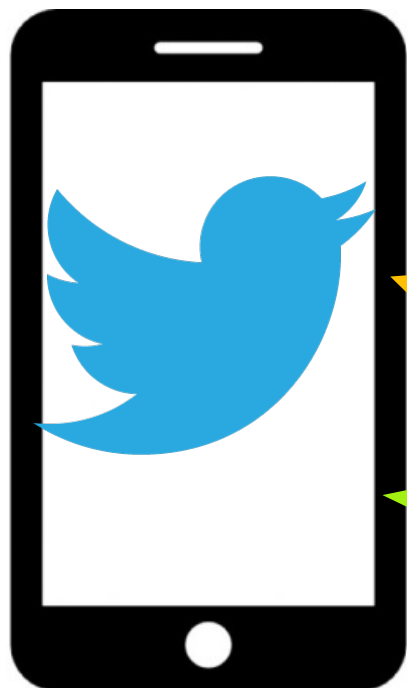
When you check your bank account and find out today is payday at work, got my osap, and got the tution rebate [#happywednesday](#) [#happymilana](#)

My bank account balance just keeps increasing  
THANK YOU OSAP  
❤️ [#richforaweek](#)  
[#tryandsave](#) [#newcar](#)

OSAP already?? Completely down with that [#richyrich](#) [#money](#)

Osap gives me the warm fuzzy wuzzies in my heart and in my visa

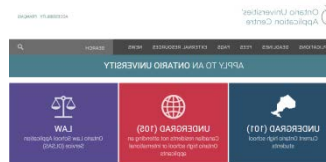
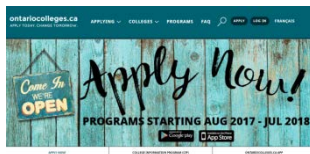
Well that made my morning 😊 [#osap](#) [#universityStudentProblems](#)





# IT enablement of OSAP Transformation

- The modern iACCESS platform positions the ministry to continuously augment the digital business model:
- IT Enablement of OSAP transformation to take place in two parallel streams:
  - **Digital Signature Project**
    - Iterative releases of a series of device-independent (smart phones, tablet, desktop, etc.) functions for students
    - Aligning the OSAP web design with Ontario Government official web site (Ontario.ca)
  - **OSAP Transformation Project**
    - Implement system integration with OUAC and OCAS to enable students to apply for financial aid much earlier in the school year cycle by November 2016

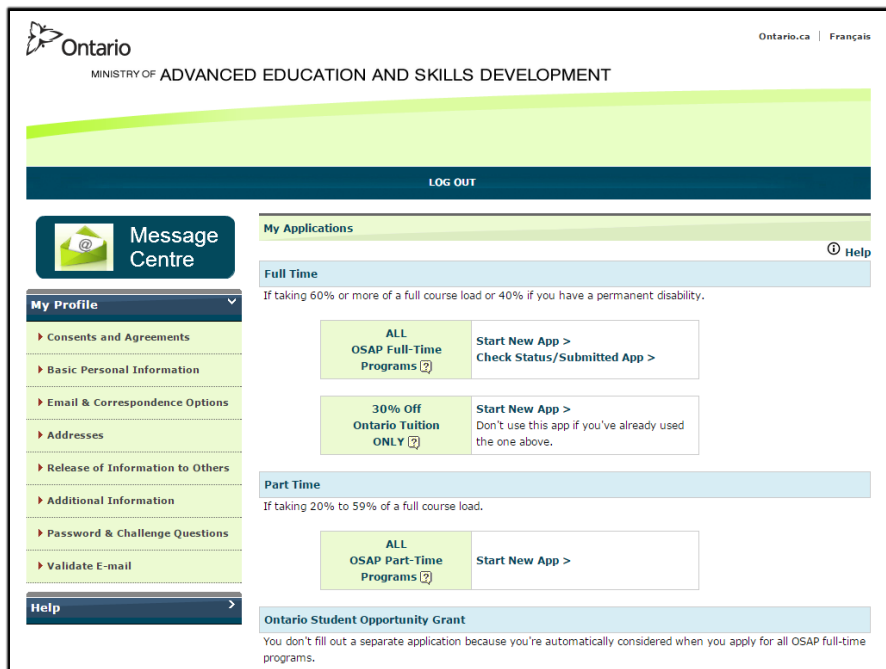


- Implement programming for Net tuition/Net billing initiative by August 2018

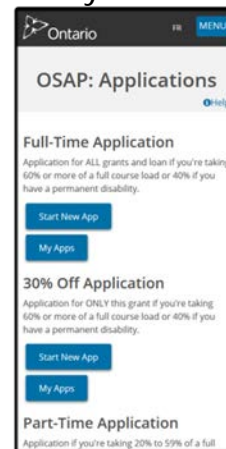


# Alignment with Ont. Gov. official web site (Ontario.ca)

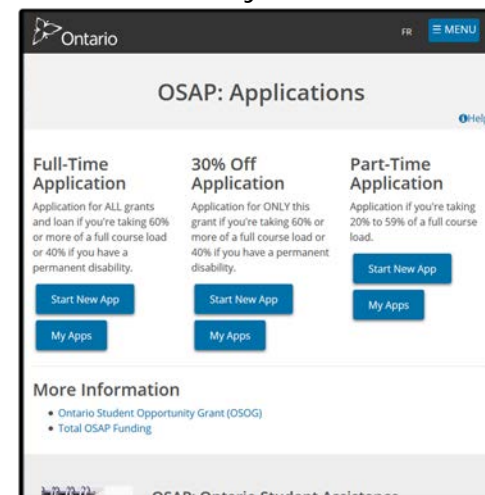
Before



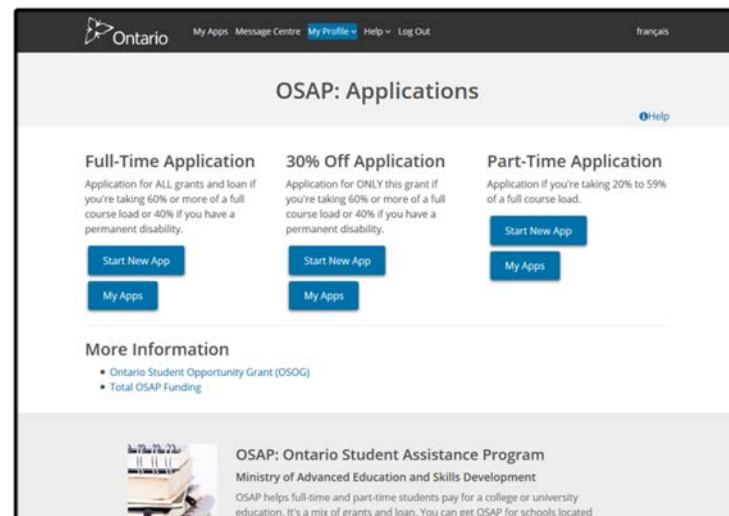
Today - Mobile



Today - Tablet



Today - Desktop



OSAP: Ontario Student Assistance Program

You can get grants and loans to help you pay for university or college when you qualify for OSAP.

[Log in or see messages](#)

**Apply for 2016-17**  
Find out how to apply.

**Can I get OSAP?**  
Find out if you qualify.

**Pay back your loan**  
Find out how and when to make your payments and see if you qualify for repayment assistance.

**Get ready for 2017-18**  
Starting next year, OSAP is changing. You could be eligible for free tuition.

**Register**  
Create your OSAP profile and we'll let you know when it's time to apply.

**The new OSAP can help**  
Find out how much you could get.

I am in high school  I will go to  university

I am a married/common-law student  college

I have  children  private career college

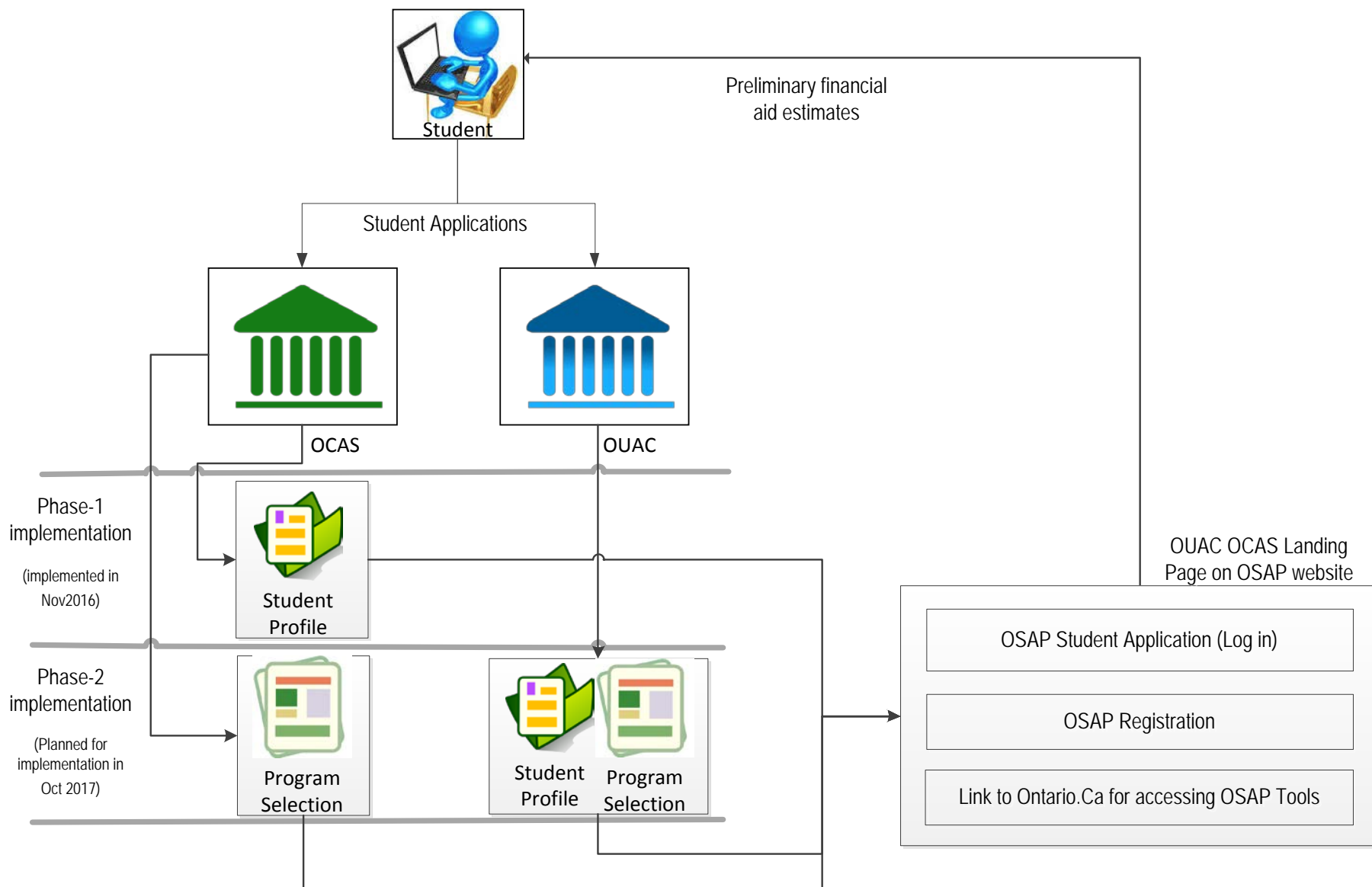
Parental income: \$   I will live with parent/guardian

**Resources**  
Forms  
Approved schools  
List of all OSAP grants and loans  
OSAP definitions

**Other loans, grants, scholarships and bursaries**  
Help beyond OSAP that can help you pay for a college, university or

**Go to college or university in Ontario**  
Learn the admission requirements and application process for attending college or university in Ontario.

# OUAC and OCAS integration with OSAP



# OUAC and OCAS integration with OSAP

Once OCAS Payment process is complete, link to OSAP gets enabled on OCAS website. Students can use the link and prefill OSAP application from the data already entered into the OCAS application.

The screenshot shows the Ontario Colleges .CA website interface. The top navigation bar includes the logo, a 'Have a question? HELP' button, and account information: 'ocasocas qaqaesting | Account Number:210017764091 (Active) | Edit Access Account' and a 'Logout' link. A left sidebar menu contains sections for 'My Home', 'My Profile' (with sub-items like Personal Information, Contact Information, etc.), 'My Applications' (with sub-items like Program Choices, Basis of Admission, etc.), and 'Activity History'. The main content area displays a notification: '2017/01/30 - Your payment of \$102.00 has been approved..'. Below this is the 'Payment Details' section, showing 'Application Number : 17-001-4392', 'Order : ORD-133908-Q1Z9C2', and 'Date : 2017/01/30 12:12 PM'. A table lists the application details: 'Application to Ontario Colleges - App # 17-001-4392' for \$102.00, with 'Included Program Choices' including '1. Algonquin - Computer Engineering Technology - Computing Science'. The 'Total Paid (CAD)' is \$102.00. There are buttons for 'Print Summary' and 'Go to the Home Page'. Below the payment details is a table with columns 'Details' and 'description':

Details	description
Bank Approval Code	285383
Message	APPROVED * =
Confirmation Number	ORD-133908-Q1Z9C2

At the bottom of the page, a red dashed box highlights a promotional banner for OSAP. The banner contains the text: 'You may be eligible for FREE TUITION through OSAP.' followed by the OSAP logo and a green checkmark, and then 'Check here to open your OSAP account. No obligation - you complete your OSAP application when you've chosen your college.' A red arrow points from the text below to the banner.

Using this link, students can go to OSAP Student Information Portal for OSAP details and applying for OSAP

# OUAC and OCAS integration with OSAP (contd.)



## New User Registration

### My Profile

[Clear Page](#)

Information from the Ontario College Application Service (OCAS) has been used to prefill some of the items on this page. If there is an update since then, enter the new information.

#### Basic Personal Information

This information (except for OEN) is verified with the Social Insurance Register to confirm your identity.

**First name:**

**Last name:**

**Date of birth:**




**Gender:**

Male

Female

**Social Insurance Number (SIN):**

**Ontario Education Number (OEN):**

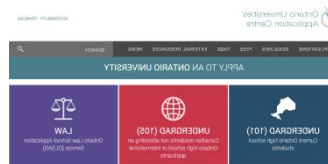
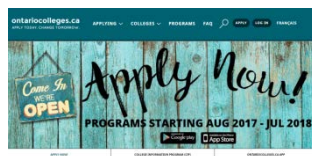
Student profile details are imported from OCAS and filled into the OSAP form.

In addition, address details are also filled in.



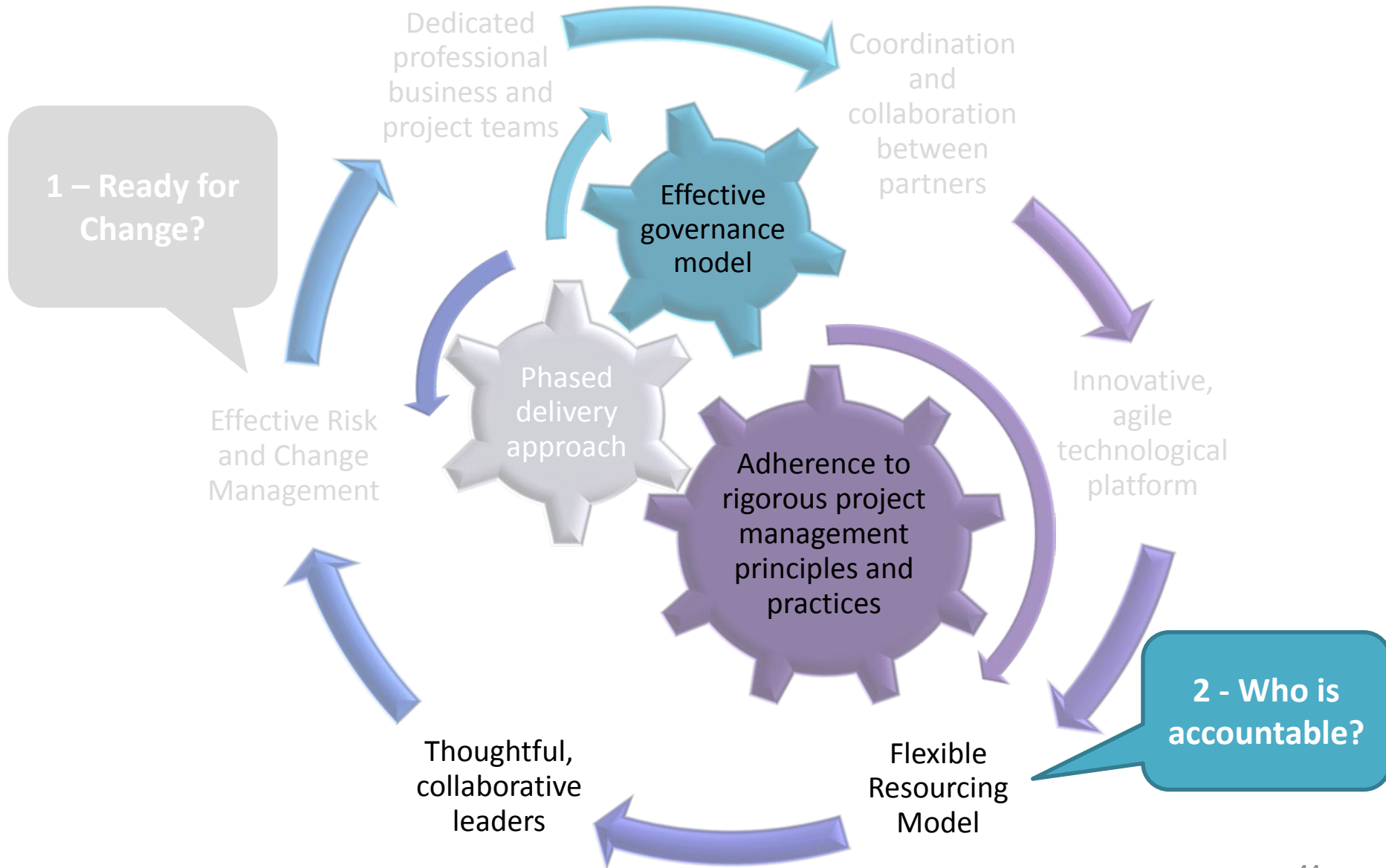
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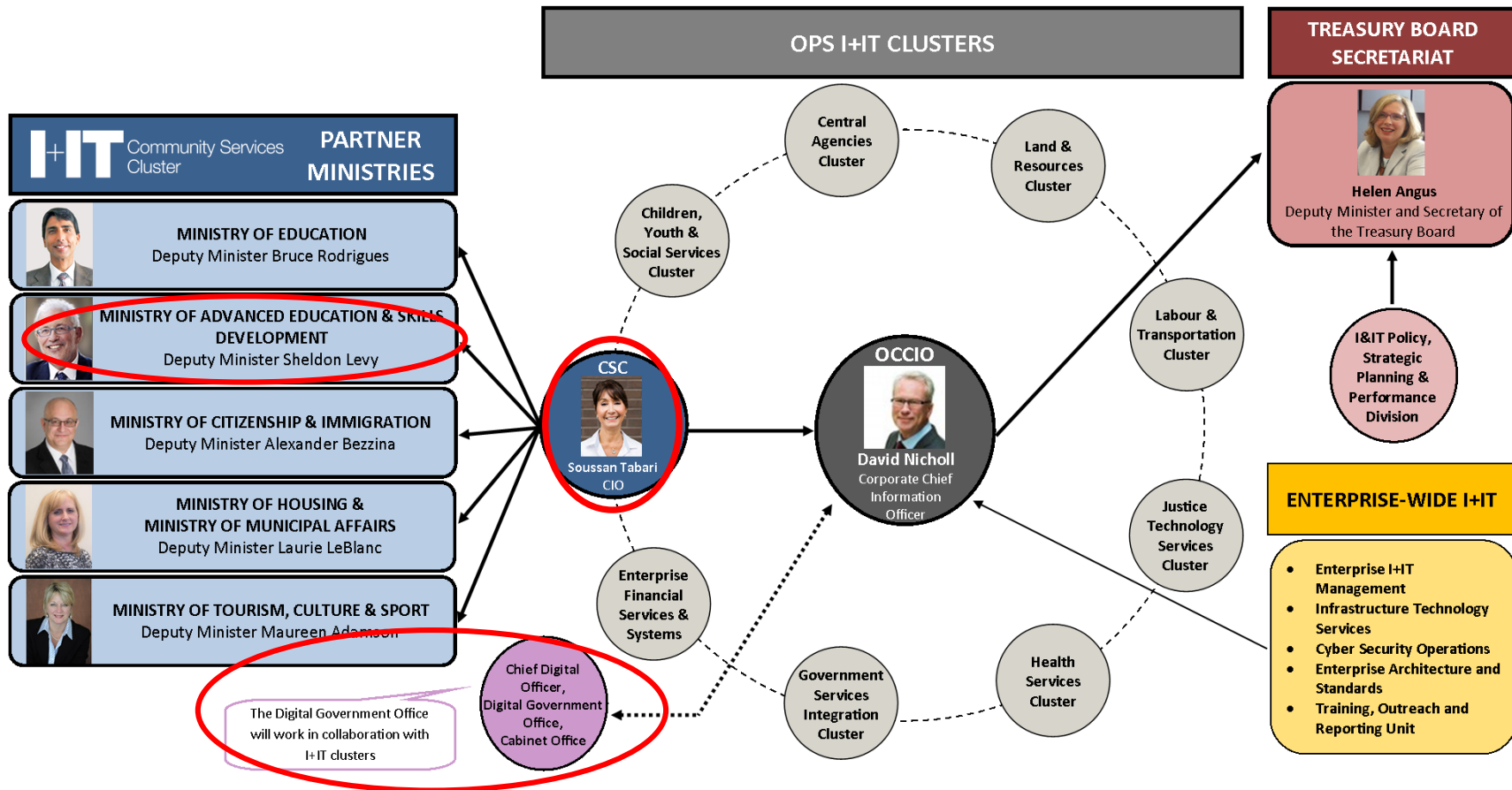


- Implement programming for Net tuition/Net billing initiative by August 2018

# So the Business Case is approved – Now you have to deliver!!



# CSC Reporting relationship – A True Horizontal Matrix





# Challenges of multiple/multiple players

Who's accountable for what ?

Agile versus Chaos

Governance with broader membership

## Presentation Outline...

Elements covered = Role of IT, executing a vision, leadership, building a team, transforming a business

Challenge, lessons learned

Bringing it together – shift to Digital leadership, from IT enabler to Digital integrator

