



## Newsletter Announcement

### Greetings CSAC!

We are proud to present the first newsletter for the Grant Delivery System Modernization (GDSM) Project. The purpose of this newsletter is to inform and educate every staff member on the updates of GDSM. Newsletters will be sent out quarterly to promote project awareness.

The California Student Aid Commission (Commission) processes grant, scholarship, and loan payback applications. Additionally, we award \$2.1 billion of funds every year. The Grant Delivery System (GDS) combines old and new technologies to process student grants

applications and awards such as Cal Grant. The Commission has been working on the GDSM project to replace the legacy GDS. The GDSM project will modernize the grant delivery system and provide efficient methods of processing awards.

Currently, the GDSM project is still in its planning stages. The CA Department of Technology has developed a Project Approval Lifecycle which the GDSM project must pass in order to request funds to complete the project. Commission staff and stakeholders are working together to develop detailed solution requirements for GDSM.

The Commission appreciates your patience as staff and stakeholder work diligently on this project.

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## 5 Things You Should Know About GDSM

1. The Department of Technology developed a Project Approval Lifecycle (PAL) for all Statewide project assessments that must be completed before awarding a contract.
2. GDSM must meet all Stage/Gate Model requirements (which are part of PAL) in order to be approved for a contract to start the project.
3. GDSM will make WebGrants4Students website and CSAC applications compatible with multiple internet browsers, apps, and electronic devices.
4. GDSM will integrate all of CSAC's programs into one system.
5. Project Launch Date is targeted for **FALL 2020**.

To inquire more information about the GDSM Project, visit the webpage: [http://www.csac.ca.gov/gdsm\\_project.htm](http://www.csac.ca.gov/gdsm_project.htm)

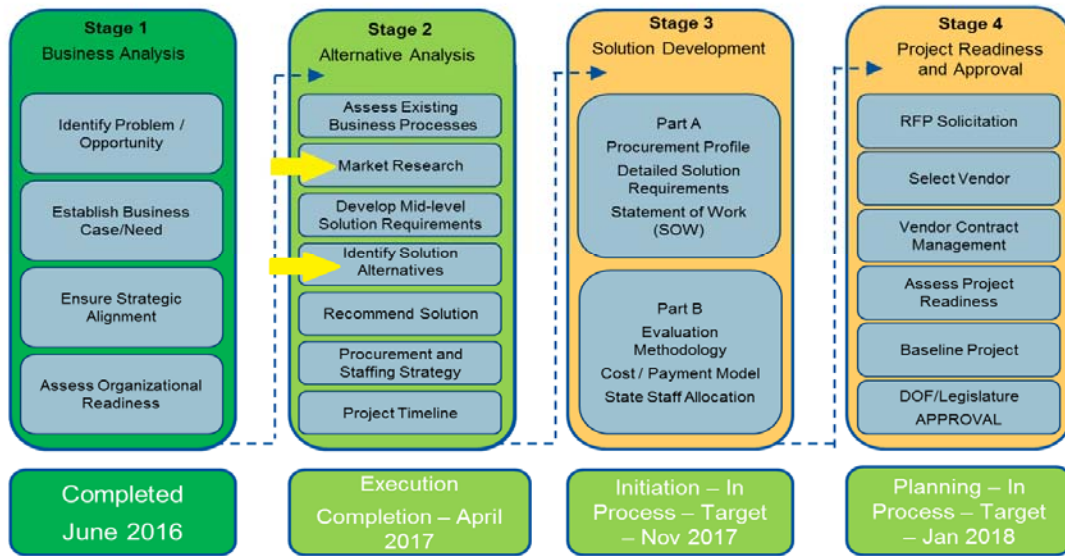
The California Department of Technology developed a Project Approval Lifecycle which requires the GDSM Project to achieve a Stage/Gate Model before receiving approval to award a contract to start the project.

The project has completed Stage 1 of the Business Analysis and is currently in Stage 2: Alternatives Analysis. The CSAC team and external stakeholders have reviewed, narrowed, and revised mid-level requirements. We are currently working

on the “**Market Research**” and “**Identify Solution Alternatives**” sections where vendor demonstrations are being reviewed.

**Stage 2 requirements are due on April 10th.** Right now, the GDSM project is moving along the Stage/Gate Model fairly fast as we wrap up Stage 2 and ramp up for Stage 3.

If you have questions about the status of the project, please contact Sheri Pires at [spires@csac.ca.gov](mailto:spires@csac.ca.gov).



### Stage/Gate Model: Where are we?

- Submitted Deliverable 3 (2/6/2017): contains mid-level requirements, baseline process, to-be processes, and more
- Currently focusing on steps for Market Research and Identify Solution Alternatives
  - Compiled & sent script requirements to potential vendors
  - Viewed 10+ vendor demonstrations for possible solutions

### Stage 2 Achievements

- Revised & condensed 800+ requirements, 11 to-be process flow-diagram, and 12 use cases to:
  - 233 Mid-level requirements
  - 379 System and Technical requirements
  - 47 Project-transition requirements

### Identify Solution Alternatives

Part of the Market Research requirement involves looking at different solutions for the project. There are FOUR solution alternatives for GDSM: COTS, MOTS, Custom, and Existing.

- COTS & MOTS:**
  - COTS:** “Commercial off the Shelf” product that is purchased and used as is
  - MOTS:** “Modified

### Identify Solution Alternatives

- “off the Shelf” product that can be tailored to our need
- Custom:** Product purchased off the shelf to help build a new system from the ground up ; requires in house processing which we have with our current GDS
- Existing:** Using our old/current system and upgrading it

# GDSM Project Champions

Please join us in welcoming the Project Champions for GDSM. Champions will be participating in monthly meetings to provide insight and obtain information on GDSM updates. They will also be the point of contact for users and external stakeholders in their segments.



**K-12**

**Cash for College & Cal-SOAP Champions:**

- ◇ Gina Browne
- ◇ Steve Caldwell

**Accounting/Budget/Finance/Audit Champions:**

- ◇ Kathleen Finnigan
- ◇ Ana Marquez

**University of California (UC) Champions:**

- ◇ Chris Carter—Office of the President
- ◇ Patrick Register—UC Santa Cruz

**California K-12 Champions:**

- ◇ Christina Espinoza (Fresno Unified School District)
- ◇ Gilbert Viveros (LA Unified School District)
- ◇ Santiago Morales (Rep. for Private/Charter Schools)



**CA Community College (CCC) Champions:**

- ◇ Bryan Dickason—Office of the Chancellor
- ◇ Jana Cox—Santa Rosa (region 3)
- ◇ Marnie Shively—Yosemite (region 5)
- ◇ Dennis Schroeder—La Mission (region 7)
- ◇ Patricia Larkin—Southwestern (region 10)

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**Private Non-Profit Champion:**

- ◇ Lynn Fox—UOP

**Private For-Profit Champion:**

- ◇ David Allen

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**Student Champion:**

- ◇ Commissioner Devon Graves



**National Guard Champions:**

- ◇ Katrina Beck
- ◇ Clarita Cortez



**California State University (CSU) Champions:**

- ◇ Dean Kulju—Office of the Chancellor
- ◇ Rose Pasanelli—San Diego
- ◇ Chip Pierce—San Diego

## Meet the Core Team

The Core team is a sub-team that will drive the gathering and reporting of the Project Approval Lifecycle information and analysis.

- ◇ Tae Kang
- ◇ Dianna Ximenez
- ◇ Nai Saeturn
- ◇ Tabitha Frost
- ◇ Justin Watkins
- ◇ Lisa Wright
- ◇ Santiago Morales (not pictured)



# February FAAB Subcommittee Meeting

## Meeting Overview

During the February FAAB Subcommittee Meeting, the GDSM team identified Project Champions for different segments and important stakeholders. Champions presented what they can bring to the project as far as communicating GDSM to their external users.

The team also highlighted GDSM's Project Change Management Strategy which will map ways of promoting project awareness. Here are CSAC's methods of communication:

- ◇GDSM Webpage
- ◇GDSM List Serve
- ◇CSAC Conferences
- ◇CSAC Newsletter

## Project Roadmap for Stage 3

For Stage 3, the Core team, along with different champions and stakeholders, will participate in Subcommittee Detailed Requirements Workshops to work on developing detailed solutions. The following are tentative workshop dates and details.

### 1st Workshop— Mar. 9, 2017

- ◆ CSAC Financial Aid Program Applications & Required Documentation for Partners

### 2nd Workshop—Mar. 16, 2017

- ◆ Processes: Apply through Determine Eligibility

### 3rd Workshop—Mar. 23, 2017

- ◆ Processes: Outreach—Cal-SOAP, Cash for College

### 4th Workshop—Mar. 30, 2017

### 5th Workshop— Apr. 6, 2017

- ◆ Processes: High school, student, and parent portal functionality

### 6th Workshop—Apr. 13, 2017

- ◆ Processes: Define user roles and capabilities

### 7th Workshop—Apr. 20, 2017

- ◆ Processes: Reports, Letters, Notifications, Forms, Alerts, Flags.

### 8th Workshop—May 4, 2017

- ◆ Final requirements walkthrough of detailed functional specifications for submission to CDT and Request for Proposal (RFP) to vendors

## Next Steps

- Mar. 2—Project Champion Meeting (completed)
- Mar. 9 — Host 1st workshop CSAC SME's (completed)
- Mar. 16 — Host 2nd workshop—Colleges & CSAC SME's
- Mar. 23—Project Champion Meeting
- Mar. 23 — Host 3rd Workshop—Cal SOAP and Cash for College
- Mar. 30—Host 4th Workshop
- Apr. 6— Host 5th Workshop—High schools, Students, and Parents
- Apr. 10 — Focus on completing Stage 2 Alternative Analysis
- Apr. 13—Host 6th Workshop—CSAC SME's
- Apr. 20—Host 7th Workshop—CSAC, Colleges, Cash for College, Cal SOAP, High schools, and all report stakeholders
- May 4—Host 8th Workshop