California
Student Aid Commission

Grant Delivery System Modernization Project (GDSM)

Presented By: California Student Aid Commission

Agenda

- GDSM Project Overview
- GDSM Project Objectives
- GDSM Project Scope
- GDSM Project Key Messages
- GDSM Project Requirements
- Current GDSM Project Status
- GDSM Project Planning Timeline
- GDSM Project Next Steps
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- Questions?

GDSM Project Overview

The GDSM Project is a collaboration among the California Student Aid Commission (CSAC) and its partners including:

CSAC Partners	
California High Schools (HS)	Private Non-Profit Schools
California Community Colleges (CCC)	California State University (CSU's)
University of California (UC's)	Cash for College
Private For-Profit Schools	Legislative & Executive State Government
Students and Parents	Numerous statewide organizations and public interest groups.
Cal-SOAP's	State of California Dept. of Education

The GDSM Project Solution will provide automation for the support of processing grants, scholarships and other CSAC financial aid programs, and quickly adapt to any changes to programs or any new program that could be implemented in the future.

GDSM Project Objectives

A Modernized GDS System

The objective is to implement a modernized GDS System that:

- Is functionally integrated with all Partner Systems (Segments, Students, FAFSA, etc.)
- Reduce the amount of manual processes;
- Quickly adapt and change to meet legislative, regulatory, and operational requirements;
- Built and documented according to current and future technology trends;
- Provide an open architecture for rapid deployment of new technology needs and enhancements;
- Provides access to aid on current mobile platforms;
- Marketing campaigns, recruitment, targeted population;
- Implements system security and privacy technologies;
- Web Portal for students, parents, institutions to view and make decisions based upon immediate access to data, funding status, financial aid programs available;
- Provides for web entry of all applicable program data and provides for user friendly mass data upload capability.

GDSM Project Scope - Financial Aid Programs

The following Financial Aid Programs must be supported in the GDSM Project Solution

Cal Grant Program	California Dream Act Application
Web Grants and Web Grants for Students	Cash-for-College Program
California Chafee Grant Program - Foster Youth	Middle Class Scholarship Program
California National Guard Education Assistance Program	Cal-Soap Program
California Student Opportunity and Access Program updates	Assumption Program of Loans for Education (APLE)
FAFSA Prior-Prior-Year Updates	Multiple annual changes made pursuant to program or Legislative requirements

GDSM Project Stakeholders

Key Messages

- √ **Awareness – Provide Understanding of the GDSM Project and let Stakeholders know how it will benefit them (What's in it for me?)**
- √ **Be aware that people resist change.**
- √ **Project Key Focus – People, Process, Outcomes, and Facilitate Adoption**
- √ **Project Team – Provide Summary Status frequently and let stakeholders know about successes and issues**
- √ **Participate and Contribute – We need Project Champions!!**

GDSM Project Scope Includes

High Level Requirements

- **Application Process** – Deliver Services
  - Online Calculator & Estimator
  - Financial Aid Tutorials & Step through Guides
  - Auto Population of Student Data
  - Immediate Award Notification
  - Eligibility Rules and Validation
  - Flexibility – Allow Institution to Approve Awards
- **Disbursement (Just in Time) Process**
  - Awards disbursed weekly
  - Financial reconciliation tools
  - Streamlined payment rosters
  - Direct funding to recipients
  - Flexibility – Allow Institution to Fund Student Award
- **On-line/Real Time Support Services**
  - Online Chat
  - Help Desk
  - Facebook
  - Twitter
  - Text
  - Snap Chat
  - Social Network Tools
- **Outreach and Marketing**
  - Tailor Marketing to Specific Population
  - Social Network Tools
  - Track Effectiveness
  - Tools for Partners

GDSM Project Scope Continued

High Level Requirements

Web Portals

- **Student Portal**
  - Information
  - Assistance
  - Training
  - Collaboration
  - Chat with Counselors
- **Partner Portal**
  - Information
  - Student Applications
  - Grants and Scholarships
  - Student Action Items
  - Award Details & Eligible Funds
  - Collaboration Institution Advisors

Reporting/Business Intelligence

- Reporting program, grants, scholarship, population, funding, disbursements, reconciliations, invoicing, etc.
- Dashboards – Provide Dynamic Real Time Key Performance Indicators (KPI's) and Metrics Built for each Institution Partner
- Ad Hoc Requests
- Data Mining

Data Exchange – Real time interfaces – sharing information

GDSM Project Scope Continued

High Level Requirements

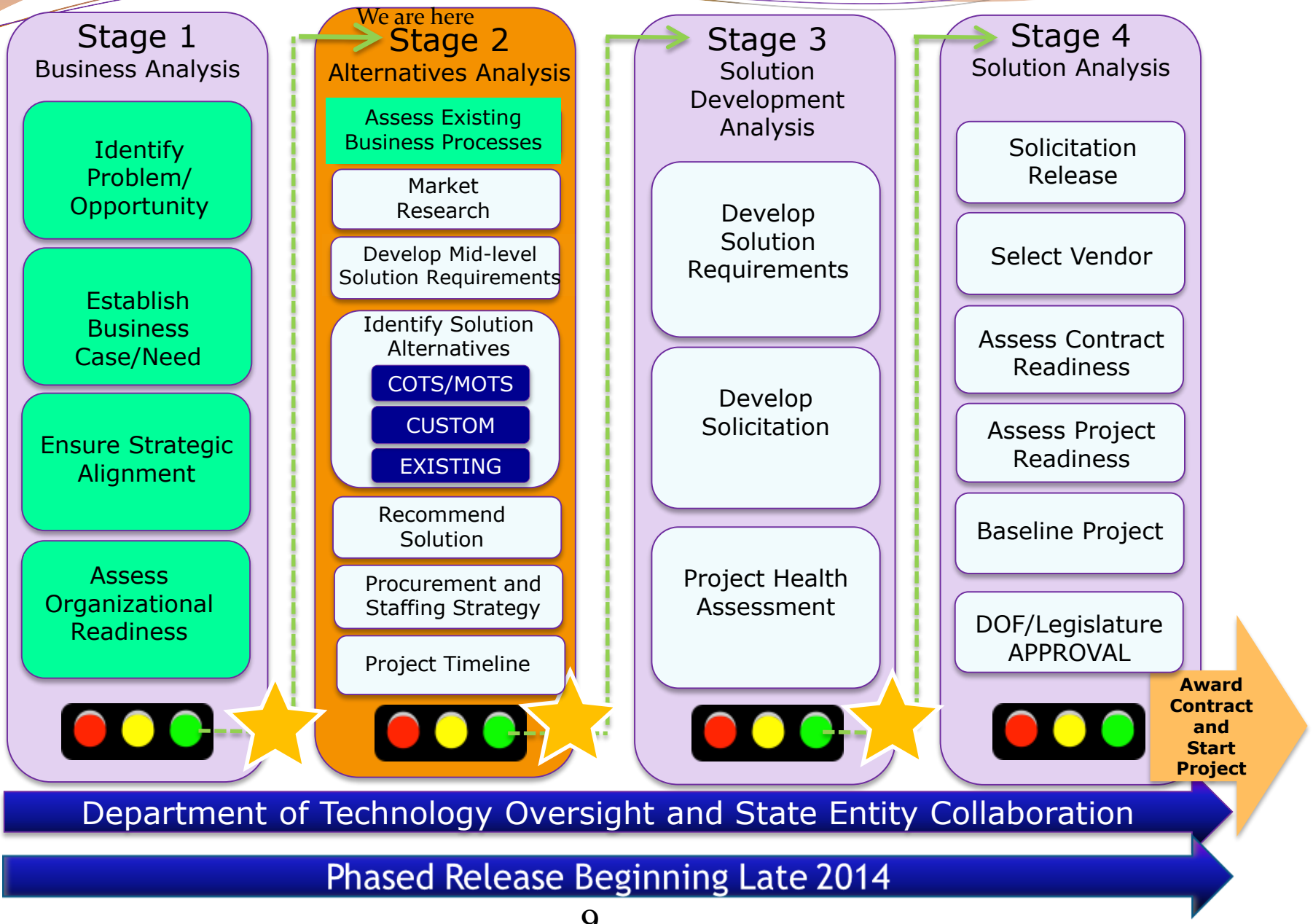
Events
- Send events to targeted groups
- Cash for College
- Cal-SOAPs
- High School Outreach
- Virtual Campus
- Tracking of Events
- Surveys

Awareness
- Improve awareness through outreach and education:
  - Low Income Families
  - Poor School Districts
  - Targeted High Income, High Demand, critical skills, etc.

Online Programs and Training
- Provide online programs and training for mobility issues or remote locations

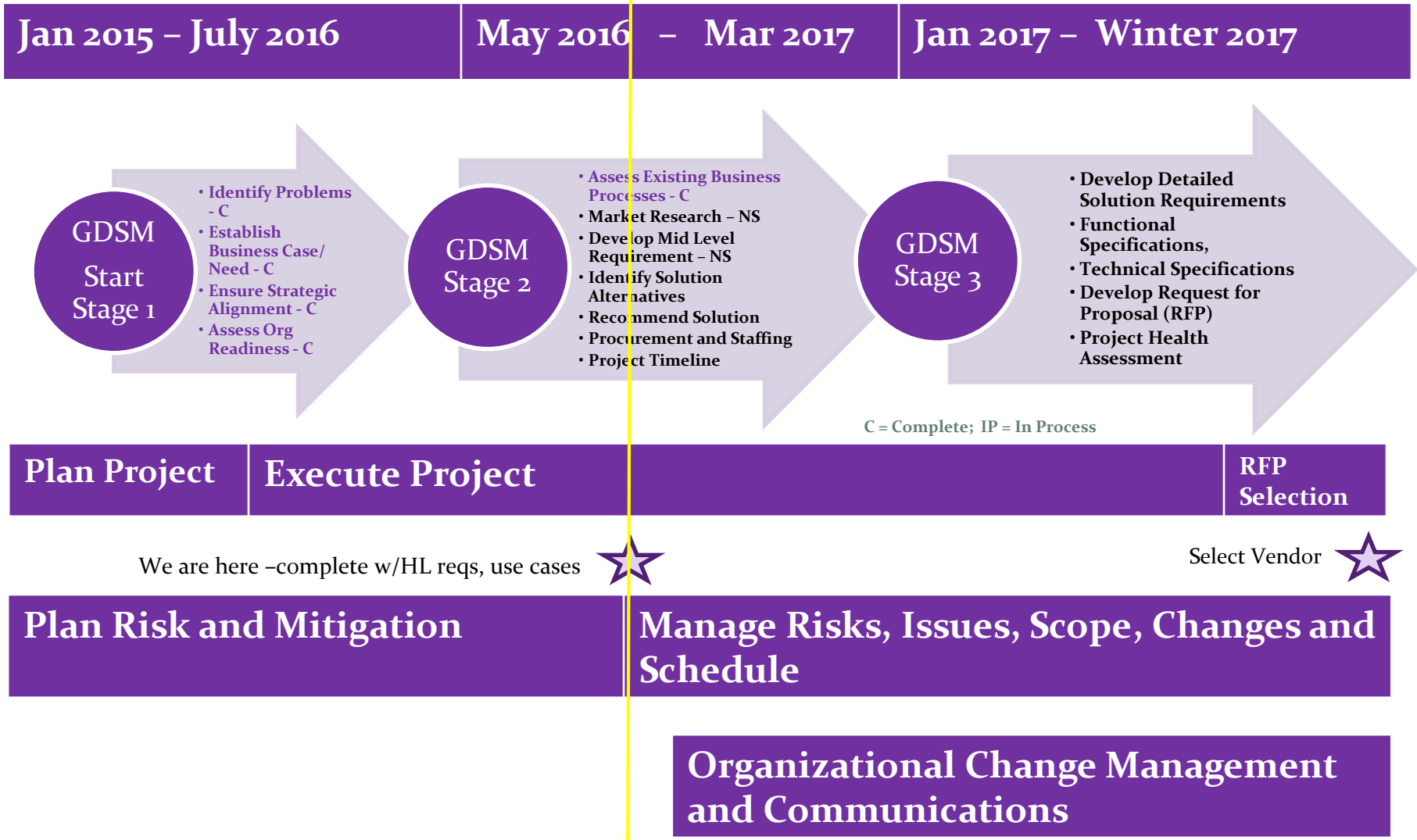
Early Access
- Training, Education, Assistance prior to High School Senior
- Early Eligibility and Incentives for good GPA's through High School

Stage/Gate Model



GDSM Project High Level Schedule

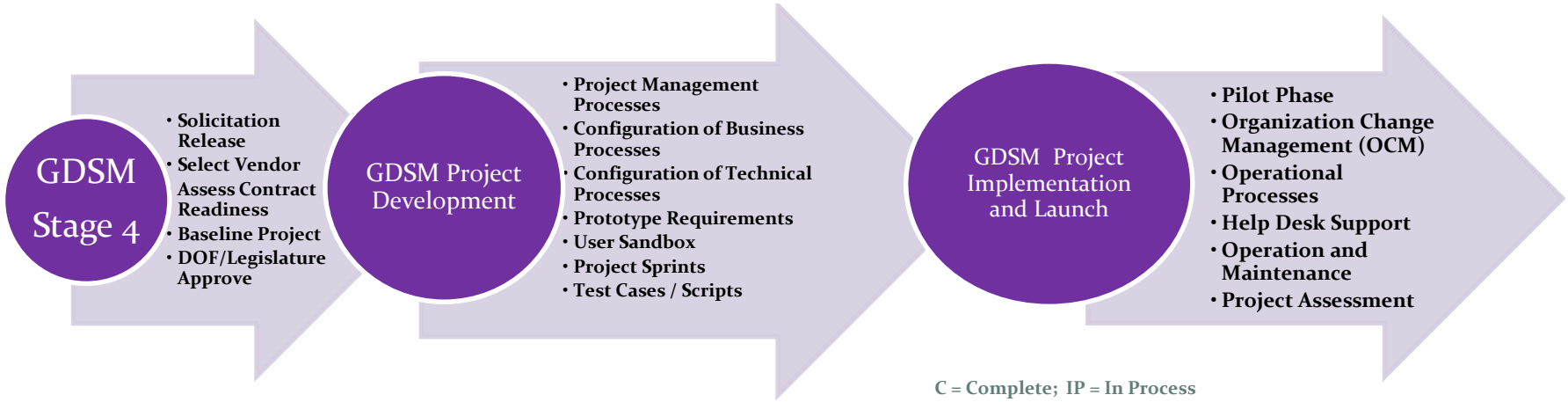
November 10, 2016



GDSM Project High Level Schedule Cont.

November 10, 2016 Still in Stage 2

Fall 2017 – January 2018	Jan 2018 – Jan 2019	Jan 2019 – Summer 2020



C = Complete; IP = In Process

Execute Pre-Project	Development/Test Project Solution	Launch GDSM

Ready for Launch ☆ Pilot Phase

Manage Risks, Issues, Scope, Changes and Schedule

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Organizational Change Management and Communications

GDSM Project Next Steps

Stakeholder Involvement in the Project:

- In the near future, (November 2016, January, February and March 2017) we will be reach out to key stakeholders for input on the GDSM Project. Including student groups, segments, institutions, financial aid administrators, high school districts and campuses, other student aid partners and interested organizations.
- The functions of the GDSM Solution must be identified and finalized during Stages 2 and 3. Stage 3 will involve sending out an RFP to select a Systems Integrator/Solution Provider to build our modernized system, based on the requirements and functionality identified and finalized in Stages 2 and 3.
- Target completion of Stage 2 by March 30, 2017, and no later than June 30, 2017, the end of this fiscal year.
- Target completion of Stage 3 by October 31, 2017.

GDSM Project Organizational Change Management (OCM) and Stakeholder Communications

GDSM Financial Aid Advisory Board (FAAB) Members

Association of Independent California Colleges and Universities (AICCU)	
Segment Representative	Veronica Villalobos Cruz - veronica@aiccu.edu Project Coordinator
Campus Representative	Norman Caito - caiton@usfca.edu Director of Financial Aid University of San Francisco
California Association of Private Postsecondary Schools (CAPPS)	
Segment Representative	David Allen - dallen@mticollege.edu Chief Financial Officer MTI College
California Association of Student Financial Aid Administrators (CASFAA)	
Segment Representative	Dustin Smith - dasmith4@usfca.edu Vice President of State Issues

GDSM Financial Aid Advisory Board (FAAB) Members Continued

California Community College Student Financial Aid Association (CCCSFAA)	
Segment Representative	Dr. Linda Williams - lwilliams@sierracollege.edu President
California Community Colleges (CCC)	
Segment Representative	Bryan Dickason - bdickason@cccco.edu CCCCO Specialist Student Planning and Development
Campus Representative	Karen Micalizio - micalizioka@butte.edu Dean of Financial Aid & Special Programs Butte College
California State University (CSU)	
Segment Representative	Dean Kulju - dkulju@calstate.edu Director of Student Financial Aid Services Programs
Campus Representative	Noelia Gonzalez - ngonzalez4@csustan.edu Director of Admissions and Financial Aid California State University, Stanislaus
University of California (UC)	
Segment Representative	Christopher W. Carter - chris.carter@ucop.edu Director of Student Financial Support
Campus Representative	Patrick Register - jpregis@ucsc.edu Director of Financial Aid and Scholarship Office University of California, Santa Cruz

GDSM Financial Aid Advisory Board (FAAB) Members Continued

California Department of Education (CDE)	
Segment Representative	LeAnn Fong-Batkin, Ed.D. - LFongBatkin@cde.ca.gov Education Programs Consultant College Preparation and Postsecondary Programs Office
Fresno Unified School District	
High School Counselor	Christina Espinosa - christina.espinosa@fresnounified.org Director of Guidance and Counseling Fresno Unified School District
Los Angeles Unified School District	
High School Counselor	Gilbert N. Viveros - gviveros@lausd.net College and Middle School Counselor Los Angeles Unified School District
Local School District	
High School Counselor	VACANT
California Student Aid Commission (CSAC)	
Student Representative	Devon Graves - chairgraves@gmail.com Commissioner California Student Aid Commission

GDSM Project Email Contact

Reach the GDSM Project at:
GDSMProject@csac.ca.gov

Questions?

Thank You