

## Item 8

### (Information Item)

#### Update on the Grant Delivery System Modernization Project and other emerging technology

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**SUMMARY:**

This item provides an update on the Grant Delivery System Modernization (GDSM) Project and the next phases of deliverables. This item also covers the other emerging technologies planned to improve customer service.

**RECOMMENDATION:**

This is an information item; no action is required

**BACKGROUND:**

The California Student Aid Commission (Commission) began the GDSM Project's planning phase in the 2013-14 fiscal year in response to the inadequacies of the current 30-year-old Grant Delivery System (GDS) technology. The existing GDS has limited capability, lack of security, aging technology, and disjointed functionality which causes new legislative required programs to be supported through either manual processes or the development and implementation of additional one-off systems. The existing GDS has several critical single points of failures and limited disaster recovery capability.

The GDSM Project Team officially kicked off the GDSM development in October 2018. Presently, the GDSM development project is in its' third year of four years (two years of development and two years of maintenance and operations). The new WebGrants for Students portal launched in December 2019 with advanced features that allow the users to access their information as well as new tools to help guide them through their Cal Grant process. The new online Chafee and National Guard applications are also now in production. The team has deployed a state-of-the-art infrastructure with no single point of failure and includes built-in disaster recovery.

The Commission is already garnering value from the implementation and release of Phase I of the GDSM project. The hybrid computer infrastructure (on-premise and cloud) provides an important technology foundation for the future that is secure, scalable, and equipped to better serve our students, institutions, and

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internal stakeholders. The project schedule provided below identifies the dates and milestones of the GDSM.

### PROJECT SCHEDULE/ROADMAP:

Date	Milestone
October 2018	GDSM Engineering begins
December 2019	Hybrid Computer Infrastructure Implemented Network Upgrade Completed GDSM Identity Management Integrated GDSM Web Grants for Students Released
February 2020	GDSM Chafee (Foster Youth) Released
June 2020	GDSM California National Guard (CNG) Released
October 2020	Academic Year Opening
April 2021	GDSM Web Grants for Institutions*
May 2021	GDSM CADAA*
June 2021	Maintenance and Operations/ILP Stabilization
August 2021	GDSM V1.1 Stabilization Release*
November 2021	GDSM V1.2 Prioritized Enhancement Release*
February 2022	GDSM V1.3 Prioritized Enhancement Release*
May 2022	GDSM V1.4 Prioritized Enhancement Release*

\*Projected Dates

### CURRENT GDSM PHASE 2 STATUS:

It is important to note that the projected launch date for both GDSM Web Grants for Institutions and GDSM CADAA have been delayed as set forth in the table above. We have expanded our software quality assurance testing to address defects and stabilize the GDSM software release. Secondly, we experienced delays in the contracting process which severely constrained our engineering capacity throughout the month of December, 2020. This delay necessitated the filing of a Special Project Report (SPR) in January 2021. The SPR provides state-level control agencies with the information related to project variances in schedule, scope, and/or cost.

While there are important ancillary GDSM efforts being implemented (such as the implementation of a new Interactive Voice Response system, the introduction of self-service “chatbots”, and a data warehouse), the current critical project work is focused upon the conversion of close to one-hundred web screens and menus from the antiquated legacy system

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to the new GDSM system. To date, all WebGrants for Institution screens have been designed and are in the testing phases as we expect to launch the new institution WebGrants screens in late spring 2021.

### APPLICATION PORTFOLIO MANAGEMENT/FUTURE GDSM RELEASES:

As we prepare to release Web Grants for Institutions, and other key applications later this year, it is important to recognize that this will not be a final release of GDSM. With an adaptive, secure, highly-available technology foundation, we will be working closely with our institutional and internal stakeholders to develop and release important enhancements and features that will provide more automation, flexibility and self-service guidance within the GDSM experience. Our executive team and senior leadership will work in concert with our IT Application Development staff to establish and prioritize continuous improvements to the GDSM platform while also responding to legislative and policy changes impacting the programs and applications we support.

The final stage of GDSM in 2021 thru December 2022, is stabilization, enhancement and continuing to train state staff for ongoing maintenance and operations. At the end of this stage, the GDS legacy system will be decommissioned.

### EMERGING TECHNOLOGY:

**Chatbot:** Commission staff has developed and implemented a basic chatbot on our main website to augment the call center and answer frequently asked student's questions 24/7. This chatbot is in its infancy and answers 50 frequently asked questions. For the next phase of chatbot development, we are working on enhancements such as natural language understanding (NLU) and built-in artificial intelligence (IA). These enhancements increase the efficacy of chatbot interactions, which subsequently should reduce interaction with the call center. It will also yield data which is helpful in proactively addressing student questions.

**Texting/SMS:** CSAC is working with several vendors to research the best technology to use text messaging in addition to emails and snail-mail. Texting will help CSAC with broader and faster outreach to students informing them about key issues that require their attention.

### RESPONSIBLE PERSON(S):

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