Alberta Service Alberta

FOIP Review and Transformation
FOIP Operational Services
4th Floor, Labour Building
10808 – 99 Avenue
Edmonton, Alberta T5K 0G5
Telephone: 780-644-2397
Fax: 780-643-2268
Email: LBR.IPO@gov.ab.ca

January 2, 2020

Janet French
10006 101 Street NW
Edmonton, AB
T5J 0S1

Email: jfrench@postmedia.com

Access Request: 2019-G-0975

Dear Ms. French:

Re: Freedom of Information and Protection of Privacy Act Request for records pertaining to the Alexander Rutherford Scholarship

On August 19, 2019, the Service Alberta Freedom of Information and Protection of Privacy (FOIP) office on behalf of Advanced Education received your access to information request. The decision to release the records was provided by the delegated decision maker for Advanced Education. A package consisting of 181 pages is enclosed.

Some of the information has been removed from the records due to the following sections of the FOIP Act:
-    information that was advice, analysis, consultation and deliberation under Section 24(1).

Section 24(1)(a)(b)(i) of the *Freedom of Information and Protection of Privacy (FOIP) Act* was applied to remove information that could reasonably be expected to reveal advice, analysis, consultation and deliberation of public bodies, as indicated in the records.

Some of the records contained information that was non-responsive, such as information pertaining to addresses other than the criteria provided in your request, therefore that information has been removed and is not included in this disclosure under *the Act*. The remaining information in the records is enclosed.

The Freedom of Information and Protection of Privacy Act provides that fees may be charged for providing records when the costs exceed $150.00. The costs associated with this request did not exceed $150.00 therefore, no further payment is required.

If you have any questions or concerns about a decision made during the processing of your request, please write or call me at 780-644-7188 so that we can look at ways to address them.

If we are unable to resolve your questions or concerns, you have the right to ask the Information and Privacy Commissioner to conduct a review under section 65 of the Act. You have 60 days from the receipt of this notice to request a review by writing:

> Information and Privacy Commissioner
> 410, 9925 - 109 Street, Edmonton, Alberta
> T5K 2J8
> Telephone: (780) 422-6860
> Fax: (780) 422-5682

If you request a review please provide the Commissioner with a copy of your original request, any letter(s) of clarification, a copy of this letter and provide the Commissioner with the reasons why you are requesting a review.

Yours truly,

Brian Murphy
FOIP Senior Advisor
Enclosure (Record Package - total pages - 181)

Section 24 of the FOIP Act
Advice from officials

24(1) The head of a public body may refuse to disclose information to an applicant if the disclosure could reasonably be expected to reveal

(a) advice, proposals, recommendations, analyses or policy options developed by or for a public body or a member of the Executive Council,

(b) consultations or deliberations involving

 (i) officers or employees of a public body,

 (ii) a member of the Executive Council, or

 (iii) the staff of a member of the Executive Council,

(c) positions, plans, procedures, criteria or instructions developed for the purpose of contractual or other negotiations by or on behalf of the Government of Alberta or a public body, or considerations that relate to those negotiations,

(d) plans relating to the management of personnel or the administration of a public body that have not yet been implemented,

(e) the contents of draft legislation, regulations and orders of members of the Executive Council or the Lieutenant Governor in Council,

(f) the contents of agendas or minutes of meetings

 (i) of the governing body of an agency, board, commission, corporation, office or other body that is designated as a public body in the regulations, or

 (ii) of a committee of a governing body referred to in subclause (i),

(g) information, including the proposed plans, policies or projects of a public body, the disclosure of which could reasonably be expected to result in disclosure of a pending policy or budgetary decision, or

(h) the contents of a formal research or audit report that in the opinion of the head of the public body is incomplete unless no progress has been made on the report for at least 3 years.

(2) This section does not apply to information that

(a) has been in existence for 15 years or more,

(b) is a statement of the reasons for a decision that is made in the exercise of a discretionary power or an adjudicative function,

(c) is the result of product or environmental testing carried out by or for a public body, that is complete or on which no progress has been made for at least 3 years, unless the testing was done

 (i) for a fee as a service to a person other than a public body, or

(ii) for the purpose of developing methods of testing or testing products for possible purchase,

(d) is a statistical survey,

(e) is the result of background research of a scientific or technical nature undertaken in connection with the formulation of a policy proposal, that is complete or on which no progress has been made for at least 3 years,

(f) is an instruction or guideline issued to the officers or employees of a public body, or

(g) is a substantive rule or statement of policy that has been adopted by a public body for the purpose of interpreting an Act or regulation or administering a program or activity of the public body.

(2.1) The head of a public body must refuse to disclose to an applicant

(a) a record relating to an audit by the Chief Internal Auditor of Alberta that is created by or for the Chief Internal Auditor of Alberta, or

(b) information that would reveal information about an audit by the Chief Internal Auditor of Alberta.

(2.2) Subsection (2.1) does not apply to a record or information described in that subsection

(a) if 15 years or more has elapsed since the audit to which the record or information relates was completed, or

(b) if the audit to which the record or information relates was discontinued or if no progress has been made on the audit for 15 years or more.

(3) In this section, "audit" means a financial or other formal and systematic examination or review of a program, portion of a program or activity.

RSA 2000 cF-25 s24;2006 c17 s5

Section 65 of the FOIP Act
Right to ask for a review

65(1) A person who makes a request to the head of a public body for access to a record or for correction of personal information may ask the Commissioner to review any decision, act or failure to act of the head that relates to the request.

(2) A third party notified under section 31 of a decision by the head of a public body to give access may ask the Commissioner to review that decision.

(3) A person who believes that the person's own personal information has been collected, used or disclosed in contravention of Part 2 may ask the Commissioner to review that matter.

(4) The surviving spouse or adult interdependent partner or a relative of a deceased individual may ask the Commissioner to review a decision of a head of a public body under section 40(1)(cc) not to disclose personal information.

(5) This section does not apply

>(a) to a decision, act or failure to act of the Commissioner when acting as the head of the Office of the Information and Privacy Commissioner,
>(b) to a decision by the Speaker of the Legislative Assembly that a record is subject to parliamentary privilege, or
>(c) if the person who is appointed as the Commissioner is, at the same time, appointed as any other officer of the Legislature, to a decision, act or failure to act of that person when acting as the head of that office.

RSA 2000 cF-25 s65;2002 cA-4.5 s38

Steve Sands

From:	Troy Kalita
Sent:	Thursday, May 30, 2019 9:00 AM
To:	Sarah Mcfatridge
Cc:	Aneta Rans; Steve Sands
Subject:	FW: 2019 05 30_Scholarships SC Update
Attachments:	2019 05 30_Scholarships SC Update_V3.pptx

Steering Committee presentation attached.

Troy

From: Troy Kalita
Sent: Thursday, May 30, 2019 8:30 AM
To: Allan OBrien <allan.obrien@gov.ab.ca>
Cc: Kurt George <kurt.george@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Salima Hemani
<Salima.Hemani@gov.ab.ca>
Subject: 2019 05 30_Scholarships SC Update

Hello Allan,

Please find the IMT Slide deck that we will be presenting at this morning's Steering Committee meeting.
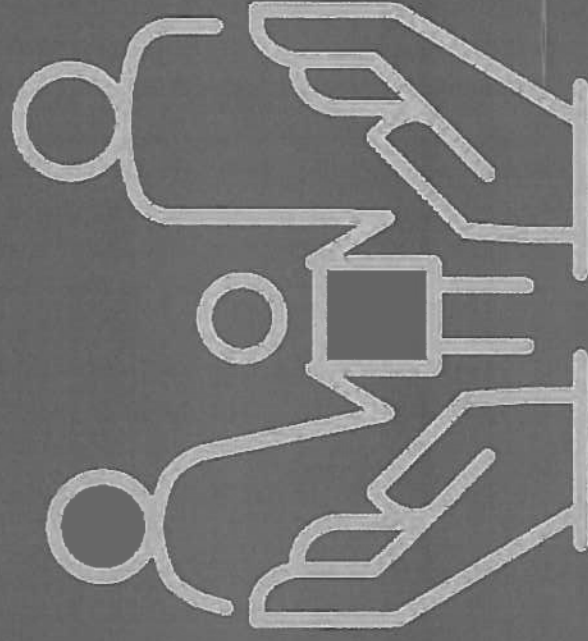
Thanks,

Troy

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Student Aid Scholarships

IMT Project Update

May 30, 2019

Alberta

Scholarships Part 1

Delivery Approach

Delivery Approach

- Focus needs to be on ensuring we can deliver as soon as possible
  - Project team scrutinized non-developed requirements
  - eDocs count in My Workspace removed

- Need to closely manage all project activities in order to deliver in a timely and effective manner
  - Business Team Manager and IMT PM working well together, and with other business areas, with clear role definition

- Clear governance and escalation paths are now in place providing the project team with the ability to receive quick decisions and direction
  - Discussed at last Steering Committee and agreed upon governance will be followed
  - No escalations identified in last week

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Scholarships Part 1

Resource Challenges

IMT Resource Challenges

- IMT resources impacted by new contract processes as of June 3

  - Kurt George – SA Program Manager
  - Sriram Vancheeswaran – SA UAT Coordinator
  - Michael Kang – SA Solution Architect

- IMT resources impacted by new contract processes as of July 2

  - Troy Kalita – SA Project Coordinator & Scholarships PM
  - Chris Schroder – Scholarships Senior Developer

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IMT Resource Challenges – June Impacts

- Kurt George – SA Program Manager
  - Some of Kurt's responsibilities will be transitioned to Troy
  - Loss of program support path (e.g. HUGH extension inquiries)

- Sriram Vancheeswaran – SA UAT Coordinator
  - Reassignment of duties to Kalaivani Sadasivam
  - System Testing of new development and bugs will take longer to complete
  - Transition activities taking time away from system testing

- Michael Kang – SA Solution Architect
  - Loss of project architectural direction & advice
  - Tasks reassigned to other project resources for completion where possible (Performance testing of new services/technologies, architecture documentation)
  - Transition activities taking time away from development tasks

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IMT Resource Challenges – July Impacts

- Troy Kalita – SA Project Coord. & Scholarships PM
  - Scholarship PM responsibilities may require transition
  - Project Coordinator responsibilities may require transition

- Chris Schroder – Scholarships Senior Developer
  - Project development tasks may require transition
  - Transition activities will take time away from development tasks

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Other Potential Resource Challenges

- Project relies on availability of business for requirements definition, clarification & solution testing

- July & August are typically a busy vacation season for business areas

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Scholarships Part 1

Schedule

Scholarships Part 1 – Schedule

Milestone	Start Date	Completion Date
Development	In Progress	Aug 7
Project UAT	In Progress	Aug 16
Integrated UAT *8 weeks requested in place of original 4	Aug 22	Oct 16
Scholarships Business Testing	TBD	Oct 16
Implementation Prep	Oct 18	Oct 23
Go Live	Oct 24	Oct 24

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Scholarships Part 1

Financials

Scholarships Part 1 – Financials

| Description	Amount
Total Budget	$2,968,983
Actuals (as of April 30th)	$1,661,324
Remaining Budget	$1,307,659
Forecast to complete	$1,017,119
Budget variance upon completion	$290,540 remaining

Scholarships Part 1

Next Steps

Next Steps

- Complete and submit a Change Request for approval via program governance
  - Scheduled go live for October 24, 2019
  - No Budget adjustment necessary as sufficient funds are available at this time.
  - Scope
    - Remove Rutherford Costing
    - Remove Moving Rutherford into Scholarships solution

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Change Request Go Forward Process

- ## Assumptions:

  - There will be no gaps in IMT resourcing

  - Business resources will be available as required

  - No new requirements will be identified

  - If changes to a requirement is needed, the project team will assess business value of change and schedule impact. If schedule/budget impacted, change will be brought forward to program governance for approval.

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Questions
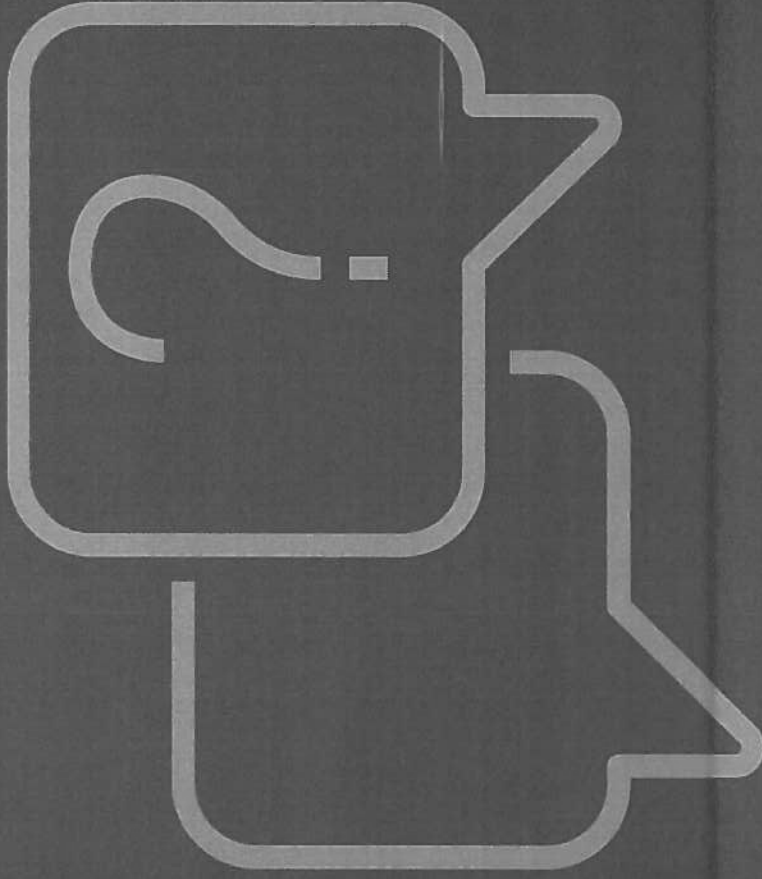
From:	Terri Brault
To:	Mike Caverhill
Subject:	Initial feasibility assessment on Rutherfords
Date:	Wednesday, June 12, 2019 12:52:19 PM
Attachments:	

This is what we have as of now. Lots of things can be done without regulatory changes. Lots of things are feasible for implementation in 2019-20, especially if it's okay that the application not go live until later in the fall.

Terri Brault, Director
Strategic Integration Policy Branch
Apprenticeship & Student Aid
Advanced Education
780-884-4473

From:	Steve Sands
Sent:	Monday, June 17, 2019 2:58 PM
To:	Karen Baggs
Subject:	RE: Rutherford Scholarship

At this point, from what I understand, the funding has not been approved/secured.

Steve

From: Karen Baggs <Karen.Baggs@gov.ab.ca>
Sent: Monday, June 17, 2019 2:54 PM
To: Steve Sands <Steve.Sands@gov.ab.ca>
Subject: RE: Rutherford Scholarship

Hi

Why is this?? **Rutherford is being assessed on SFS?**

karen

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Monday, June 17, 2019 2:52 PM
To: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>
Cc: Kevin Jacko <kevin.jacko@gov.ab.ca>
Subject: Rutherford Scholarship

Hi:

Just a quick update.....

The Rutherford application in SFS, at this point, will not be turned on until October 1st. Once 'key messages' have been written, the website and SFS notice will be updated.

Any questions let me know...

Steve

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From:	Shaune Labrecque
Sent:	June 17, 2019 3:47 PM
To:	Andre Lindo
Subject:	RE: Scholarships Update

Good job staying on top of this.

From: Andre Lindo <Andre.Lindo@gov.ab.ca>
Sent: June 17, 2019 3:40 PM
To: Kevin Donnan <Kevin.Donnan@gov.ab.ca>; Jacalyn Ambler-Brown <Jacalyn.Ambler-Brown@gov.ab.ca>; Janelle Snow <Janelle.Snow@gov.ab.ca>; Kandice Kew <Kandice.Kew@gov.ab.ca>
Cc: Shaune Labrecque <Shaune.Labrecque@gov.ab.ca>
Subject: Scholarships Update

Hi all,

We just received word that all scholarships will not launch in August, and has been pushed back to late October. We have been asked not to advertise the Rutherford Scholarship nor mention any scholarships in this social media campaign. If you have anymore questions, feel free to contact me.

Kevin, can you please update the proposal document with this information.
Janelle, can you please allow your team focus on the creative for the applications being available.

Thanks

André Lindo
Alberta Student Aid
Advanced Education
Government of Alberta

9th floor, Sterling Place
9940 – 106 Street
Edmonton, AB T6V 1V3

Tel   780-644-7859
andre.lindo@gov.ab.ca

For the latest info on Student Aid: http://studentaid.alberta.ca/.

Alberta
Government

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Hello Team,

As you may be aware, Alberta Student Aid is working on a major technology project to streamline the application and payment process for scholarships and awards. This system will not be completed until late fall.

We have assessed our options to ensure we can deliver our programs and have decided the best course of action as a division is to delay Scholarship and Award programs. This adjustment was also made in an effort to reduce capacity pressure on staff and align programming with system availability.

For the 2019-20 academic year, all Scholarship and Award applications will be available late fall. The application deadline will shift to January 15, 2020, and all payments to scholarship and award recipients will be completed by the end of March. Students will be paid as applications and nominations are received and processed.

Managers and supervisors from areas that are directly impacted were informed of these changes. A coordinated communications plan was developed to ensure all stakeholders are informed and staff are equipped with the necessary messages. For any questions, please speak with your supervisor or Manager. You may also contact Aneta Rans, Manager, Scholarship Delivery and Transformation or Sarah McFatridge, Business Lead of the Scholarship Transformation Project.

Thank you,

Maggie DesLauriers

Executive Director, Student Aid
Alberta Advanced Education
P: 780.422.4498
C: 780.717.9250
www.studentaid.alberta.ca

Alberta ▉ Student Aid

From:	Iris Beckingham
Sent:	Tuesday, July 30, 2019 1:47 PM
To:	Steve Sands
Subject:	RE: Release 19.1 - Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

You are welcome!

Iris Milne (Beckingham)
Student Aid Business Analyst
Workforce Development
Office of the Corporate Chief Information Officer
Tel 780-644-4428
Cell 780-908-4387
Iris.beckingham@gov.ab.ca

Empowering People Through Information and Technology

Alberta

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, July 30, 2019 12:10 PM
To: Iris Beckingham <Iris.Beckingham@gov.ab.ca>
Cc: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Ilyas Ahmad <Ilyas.Ahmad@gov.ab.ca>; Liana Crighton <Liana.Crighton@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Doren Pigeon <Doren.Pigeon@gov.ab.ca>
Subject: RE: Release 19.1 - Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

Sounds great!

Thanks for the update.

Steve

From: Iris Beckingham <Iris.Beckingham@gov.ab.ca>
Sent: Tuesday, July 30, 2019 10:48 AM
To: Steve Sands <Steve.Sands@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Doren Pigeon <Doren.Pigeon@gov.ab.ca>
Cc: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Ilyas Ahmad <Ilyas.Ahmad@gov.ab.ca>; Liana Crighton <Liana.Crighton@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>
Subject: RE: Release 19.1 - Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

Hi Steve, Since we have already deployed the schedule change for the Retrieve Transcript job to run daily, in 19.1, we would like to keep that change in 19.1. Since there are no Rutherford applications in the system, and won't be until

1

October, there will not be any transcripts to receive. The only change to this ticket is **having production control run the job manually from Aug 1st to Aug 8th**.

Calvin, Janet and Doren, **When you turn the Apply for Rutherford on, (not expecting until October), please ensure you let production control know as we may need to monitor the nightly batch due to the number of applications to process.**

Thanks,

Iris Milne (Beckingham)
Student Aid Business Analyst
Workforce Development
Office of the Corporate Chief Information Officer
Tel 780-644-4428
Cell 780-908-4387
Iris.beckingham@gov.ab.ca

Empowering People Through Information and Technology

Alberta

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, July 30, 2019 10:05 AM
To: Iris Beckingham <Iris.Beckingham@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>
Cc: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Ilyas Ahmad <Ilyas.Ahmad@gov.ab.ca>; Liana Crighton <Liana.Crighton@gov.ab.ca>
Subject: RE: Release 19.1 - Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

Hi:

At this point, we have been told that Rutherford will not be turned on in Production before October. A communication plan is in the works....just fyi.

If this ticket does not need to be tied to and deployed with a release, I would say to put it on hold until October.

There should be no Rutherford applications in the pipes at this point.

Thanks for checking!

Steve

From: Iris Beckingham <Iris.Beckingham@gov.ab.ca>
Sent: Tuesday, July 30, 2019 9:48 AM
To: Rosa Mejia <Rosa.Mejia@gov.ab.ca>; Steve Sands <Steve.Sands@gov.ab.ca>
Cc: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Ilyas Ahmad <Ilyas.Ahmad@gov.ab.ca>; Liana Crighton <Liana.Crighton@gov.ab.ca>
Subject: Release 19.1 - Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

Hi Steve and/or Rosa (I know Liana is away),

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Do you know if and when the Apply for Rutherford will be turned on in Production? We need to confirm if Rutherford is included in the policy to stop all Scholarship payments until October due to budget? If so, should we wait on this ticket to run the Retrieve Transcripts job every day? Are there any Rutherford applications that you are expecting to process?

Bug 35288:TE: Revise Schedule for Active Batch Job RetrieveTranscripts - Execute Daily At 6AM

Thanks,

Iris Milne (Beckingham)
Student Aid Business Analyst
Workforce Development
Office of the Corporate Chief Information Officer
Tel   780-644-4428
Cell 780-908-4387
Iris.beckingham@gov.ab.ca

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Mallory Nault

From: Mallory Nault
Sent: July 31, 2019 4:33 PM
To: Maggie DesLauriers
Cc: Allan OBrien; Sarah Mcfatridge; Aneta Rans
Subject: Scholarships
Attachments:

24 (1) (a)

Attached

1

Record(s) removed pursuant to Section 24 (1)(a) of the *Freedom of Information & Protection of Privacy Act* to your request
Page(s) 26-27

Mike Caverhill

From:	Allan OBrien
Sent:	Wednesday, July 31, 2019 8:49 PM
To:	_AE-ASA SA ITS Team; Glenn Steinke2; Steve Sands; Salima Hemani; Leo Amaral
Cc:	Maggie DesLauriers; Lisa LHirondelle; Betty Yeung
Subject:	Fwd: Scholarship and Award Programming Delay

Hi Team,

Please be on the ready in the morning should there be any questions coming out of Maggie's meeting with Rod in the morning.

No action is required until we have confirmation we are business ready but it is looking like we may be putting Rutherford online as early as Tomorrow.

I will reach out in the morning with any questions or direction.

Thank you all again for your help today!

Thanks,
Allan

Sent from my iPhone

Begin forwarded message:

> **From:** Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
> **Date:** July 31, 2019 at 6:13:31 PM MDT
> **To:** Aneta Rans <Aneta.Rans@gov.ab.ca>, Sarah Mcfatridge <Sarah.Mcfatridge@gov.ab.ca>, Mallory Nault <Mallory.Nault@gov.ab.ca>, Allan OBrien <allan.obrien@gov.ab.ca>
> **Subject: Fwd: Scholarship and Award Programming Delay**
>
> Please see email below. Is it possible to get the Rutherford application up tomorrow?
>
> Thanks
> Maggie
>
> Begin forwarded message:
>
>> **From:** Jesse Robertson <jesse.robertson@gov.ab.ca>
>> **Date:** July 31, 2019 at 5:26:05 PM MDT
>> **To:** Andy Weiler <andy.weiler@gov.ab.ca>, Laurie Chandler <Laurie.Chandler@gov.ab.ca>
>> **Cc:** Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>, Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>, Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>, Demetrios Nicolaides <demetrios.nicolaides@gov.ab.ca>, Rod Skura <rod.skura@gov.ab.ca>
>> **Subject: RE: Scholarship and Award Programming Delay**

1

It is an urgent priority for the Minister that there is no disruption in scholarships and awards.

The Minister requires that the Rutherford application be opened tomorrow (August 1).

We need to ensure that other scholarships are open as soon as possible, and we need to identify other scholarships that can be released early.

From: Andy Weiler <andy.weiler@gov.ab.ca>
Sent: July 31, 2019 5:04 PM
To: Laurie Chandler <Laurie.Chandler@gov.ab.ca>; Jesse Robertson <jesse.robertson@gov.ab.ca>
Cc: Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>; Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>; Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Subject: RE: Scholarship and Award Programming Delay

Here's the document requested. There are three options and the one we're recommending is continue with the application delay as we currently have but release the Alexander Rutherford application by the end of this week. Let me know what other information you may need.

I've also run this document past Rod in the DMO. He and the Minister had a brief discussion today and Rod plans to speak with him again tomorrow.

Thanks
Andy W

From: Laurie Chandler <Laurie.Chandler@gov.ab.ca>
Sent: Wednesday, July 31, 2019 4:07 PM
To: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Cc: Andy Weiler <andy.weiler@gov.ab.ca>; Jesse Robertson <jesse.robertson@gov.ab.ca>; Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>; Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>
Subject: Re: Scholarship and Award Programming Delay

24 (1)
(a)

LC

Sent from my iPhone

On Jul 31, 2019, at 1:41 PM, Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca> wrote:

Hi Laurie

The information on the website is the only communication that's public facing. Our call center has Q&As to respond to questions from students. In addition we've communicated with our delivery

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partners (institutions, donors, athletic organizations, other GOA departments).

Please let me know if you have any questions.

Maggie

Maggie DesLauriers
Executive Director, Student Aid
Alberta Advanced Education
P: 780.422.4498
C: 780.717.9250
www.studentaid.alberta.ca
<image001.png>

From: Laurie Chandler <Laurie.Chandler@gov.ab.ca>
Sent: July 31, 2019 1:26 PM
To: Andy Weiler <andy.weiler@gov.ab.ca>
Cc: Jesse Robertson <jesse.robertson@gov.ab.ca>; Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>; Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>; Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>
Subject: Re: Scholarship and Award Programming Delay

As well, outside of the website. How much has this been communicated that is public facing?

Thanks,

LC

Sent from my iPhone

On Jul 31, 2019, at 1:09 PM, Andy Weiler <andy.weiler@gov.ab.ca> wrote:

> Okay
>
> Sent from my iPhone
>
> On Jul 31, 2019, at 12:56 PM, Laurie Chandler <Laurie.Chandler@gov.ab.ca> wrote:
>
>> **Hi –**
>>
>> **We need to move up the timeline for the information. Please have to Jesse and myself by end of day.**
>>
>> **If you have any questions, please let me know.**

3

Best,

LC

From: Andy Weiler
<andy.weiler@gov.ab.ca>
Sent: July 31, 2019 11:25 AM
To: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>; Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>;
Maggie DesLauriers
<Maggie.DesLauriers@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

Maggie and I can head down to your
office for noon. Students won't be out
of scholarship and award funding, we're
only delaying by a few months when
they can apply which will also delay
disbursement of the funds as we
continue to develop the new IT system.

From: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Sent: Wednesday, July 31, 2019 11:01
AM
To: Andy Weiler
<andy.weiler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>; Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

Can we please schedule a briefing ASAP
so we can understand this better. In the
meantime, we need to put a hold on all
communication to stakeholders. This
looks like 53,000 students are out of
scholarship and award funding.

I am available at 12:00 pm, Jesse are
you as well?

LC

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From: Andy Weiler
<andy.weiler@gov.ab.ca>
Sent: July 31, 2019 10:30 AM
To: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>; Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

24 (1) (a);24(1)(b)(i)

From: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Sent: Wednesday, July 31, 2019 10:23
AM
To: Andy Weiler
<andy.weiler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>; Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

24 (1) (a);24(1)(b)(i)

LC

From: Andy Weiler
<andy.weiler@gov.ab.ca>
Sent: July 31, 2019 9:40 AM
To: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>; Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

5

A little more info:

- Existing legacy systems needs to be decommissioned no later than December, 2019.
  - Support for the server software and hardware supporting the legacy system expires and cannot be extended.
- The new system will replace the existing legacy system, resulting in streamlined processes, and automated functions that are currently performed manually by student aid staff.
  - Students will not see a change with the new system. The change is internal facing to staff to allow more efficient processing of Scholarship and Awards.
- Without the new system, manual processes will be required to administer the scholarship and award programs, causing a higher risk of human error, delays in processing payments to recipients, and increased inquiries from students and other stakeholders.
- Students and institutions have not complained about the existing system because it is internal facing. However, they have indicated the following:
  - Scholarships should be consolidated to reduce administration for the students, institutions, and government, and
  - The delivery of scholarships needs to be streamlined to provide greater flexibility for institutions to respond to students' needs and

6

ensure that all funding is maximized.

- o At a recent meeting with student leaders, students have also expressed a desire for online self-service functionality for scholarships and awards (part of future changes we hope to implement).

From: Andy Weiler
Sent: Wednesday, July 31, 2019 9:19 AM
To: Laurie Chandler <Laurie.Chandler@gov.ab.ca>
Cc: Jesse Robertson <jesse.robertson@gov.ab.ca>; Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>
Subject: RE: Scholarship and Award Programming Delay

I've attached a DM briefing note from March of last year as a starting point (points 2 and 3 are still being explored). The system changes are back-end changes because of an aging IT system we currently use. Students (roughly 53,000 and $97M budget) won't see any publicly-facing change to the system. These are operational changes we require as a department to better administer and deliver scholarships and awards. [24 (1) (a)] [24 (1) (a)] it's operational work that was identified as critical by the Student Aid sector as the current system would no longer be supported by end of this year and there were serious concerns about the system failing at some point (it also has no flexibility to accommodate future changes to scholarships and awards programming). We've had some delays but work on the new IT system is progressing and is expected to be completed later this fall (that's why we haven't identified a specific date). We

7

initially were hoping to have it done
before August 1.

We had stakeholder engagement
(institutions) about transformation,
reasons for it, issues with current
system, why change was necessary, and
why transformation has to occur
(streamlining, automation). These
reasons for improvement were stressed
to stakeholders when engaging with
them. We also spoke with student
groups but that was more about the
consolidation/streamlining of graduate
scholarships

From: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Sent: Wednesday, July 31, 2019 8:48
AM
To: Andy Weiler
<andy.weiler@gov.ab.ca>
Cc: Jesse Robertson
<jesse.robertson@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

Can you also provide some info on
scope? i.e. how much money and how
many people will be affected?

I'm meeting with Premier's Comms
around 10:30 am and would like to be
able to answer some questions.

Thanks,
LC

From: Andy Weiler
<andy.weiler@gov.ab.ca>
Sent: July 31, 2019 8:30 AM
To: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

Will do. I've asked my team to pull
together some more info for you.

From: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>

8

Sent: Wednesday, July 31, 2019 8:11 AM
To: Andy Weiler <andy.weiler@gov.ab.ca>
Subject: Scholarship and Award Programming Delay

Hi Andy,

Can you please provide me with a bit more background on this?

i.e. when did the dept start switching over to the new system? Was this initiated by the former government? How will this improve the system for students? And what were some of the concerns, particularly from students, that were heard about the former system?

Thanks,

Laurie Chandler
Press Secretary
Advanced Education
780.203.8462

9

Hey team,

Please see the email below. We may be looking to get Rutherford up as early as tomorrow.

Please be on the ready for any questions that may come out of Maggie's meeting with Rod.

Damaris, understanding we have been aware of the delay for a while, I just want to check in to see if we have the paper apps developed for Rutherford and ready to be posted if we get direction to do so?

Shaune, could I get you to work with your team in the morning to analyze how we would need to change current communications as well as consider how we would message as clearly as possible that only Rutherford would be available and all other scholarship apps would be for October (as we have posted now). And work with Mallory/ Sarah on the Comms strategy once we have clear direction to proceed.

Don't be afraid to reach out to me if you need anything at all.

Thanks,
Allan

Sent from my iPhone

Begin forwarded message:

> **From:** Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
> **Date:** July 31, 2019 at 6:58:09 PM MDT
> **To:** Aneta Rans <Aneta.Rans@gov.ab.ca>
> **Cc:** Sarah Mcfatridge <Sarah.Mcfatridge@gov.ab.ca>, Mallory Nault
> <Mallory.Nault@gov.ab.ca>, Allan OBrien <allan.obrien@gov.ab.ca>, Shauna
> Kent <shauna.kent@gov.ab.ca>
> **Subject: Re: Scholarship and Award Programming Delay**
>
>
> Thanks Aneta! Andy and I are meeting with Rod first thing tomorrow to discuss
> further.
>
> We're meeting at 8:00 and I may have some question after that we may need to
> answer quickly for Rod's discussion with the Minister later tomorrow morning
>
> Thanks everyone for your support!
>
> On Jul 31, 2019, at 6:31 PM, Aneta Rans <Aneta.Rans@gov.ab.ca> wrote:

From a business perspective yes on Rutherford. Looping in Shauna as she will need to ensure we have money in the bank if this goes up tomorrow.

Sent from my iPhone

On Jul 31, 2019, at 6:13 PM, Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca> wrote:

Please see email below. Is it possible to get the Rutherford application up tomorrow?

Thanks
Maggie

Begin forwarded message:

From: Jesse Robertson <jesse.robertson@gov.ab.ca>
Date: July 31, 2019 at 5:26:05 PM MDT
To: Andy Weiler <andy.weiler@gov.ab.ca>, Laurie Chandler <Laurie.Chandler@gov.ab.ca>
Cc: Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>, Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>, Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>, Demetrios Nicolaides <demetrios.nicolaides@gov.ab.ca>, Rod Skura <rod.skura@gov.ab.ca>
Subject: RE: Scholarship and Award Programming Delay

It is an urgent priority for the Minister that there is no disruption in scholarships and awards.

The Minister requires that the Rutherford application be opened tomorrow (August 1).

We need to ensure that other scholarships are open as soon as possible, and we need to identify other scholarships that can be released early.

From: Andy Weiler <andy.weiler@gov.ab.ca>
Sent: July 31, 2019 5:04 PM
To: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>; Jesse Robertson
<jesse.robertson@gov.ab.ca>
Cc: Gerald Kastendieck
<Gerald.Kastendieck@gov.ab.ca>; Natasha
McKenzie <Natasha.McKenzie@gov.ab.ca>;
Maggie DesLauriers
<Maggie.DesLauriers@gov.ab.ca>
Subject: RE: Scholarship and Award
Programming Delay

Here's the document requested. There are
three options and the one we're
recommending is continue with the application
delay as we currently have but release the
Alexander Rutherford application by the end of
this week. Let me know what other information
you may need.

I've also run this document past Rod in the
DMO. He and the Minister had a brief
discussion today and Rod plans to speak with
him again tomorrow.

Thanks
Andy W

From: Laurie Chandler
<Laurie.Chandler@gov.ab.ca>
Sent: Wednesday, July 31, 2019 4:07 PM
To: Maggie DesLauriers
<Maggie.DesLauriers@gov.ab.ca>
Cc: Andy Weiler <andy.weiler@gov.ab.ca>;
Jesse Robertson <jesse.robertson@gov.ab.ca>;
Gerald Kastendieck
<Gerald.Kastendieck@gov.ab.ca>; Natasha
McKenzie <Natasha.McKenzie@gov.ab.ca>
Subject: Re: Scholarship and Award
Programming Delay

24 (1)
(a)

LC

Sent from my iPhone

On Jul 31, 2019, at 1:41 PM, Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca> wrote:

> Hi Laurie
>
> The information on the website is the only communication that's public facing. Our call center has Q&As to respond to questions from students. In addition we've communicated with our delivery partners (institutions, donors, athletic organizations, other GOA departments).
>
> Please let me know if you have any questions.
>
> Maggie
>
> **Maggie DesLauriers**
> Executive Director, Student Aid
> Alberta Advanced Education
> P: 780.422.4498
> C: 780.717.9250
> www.studentaid.alberta.ca
> <image001.png>
>
>
> From: Laurie Chandler <Laurie.Chandler@gov.ab.ca>
> Sent: July 31, 2019 1:26 PM
> To: Andy Weiler <andy.weiler@gov.ab.ca>
> Cc: Jesse Robertson <jesse.robertson@gov.ab.ca>; Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>; Maggie DesLauriers

<Maggie.DesLauriers@gov.ab.ca>;
Natasha McKenzie
<Natasha.McKenzie@gov.ab.ca>
Subject: Re: Scholarship and
Award Programming Delay

As well, outside of the website.
How much has this been
communicated that is public
facing?

Thanks,

LC

Sent from my iPhone

On Jul 31, 2019, at 1:09 PM, Andy
Weiler <andy.weiler@gov.ab.ca>
wrote:

> Okay
>
> Sent from my iPhone
>
> On Jul 31, 2019, at
> 12:56 PM, Laurie
> Chandler
> <Laurie.Chandler@gov.ab.ca>
> wrote:
>
>> Hi –
>>
>> We
>> need to
>> move
>> up the
>> timeline
>> for the
>> information.
>> Please
>> have to
>> Jesse
>> and
>> myself
>> by end

of day.

If you
have
any
questions,
please
let me
know.

Best,

LC

Programming
Delay

Maggie
and I
can
head
down
to your
office
for
noon.
Students
won't
be out
of
scholarship
and
award
funding,
we're
only
delaying
by a
few
months
when
they
can
apply
which
will also
delay
disbursement
of the
funds
as we
continue
to
develop
the
new IT
system.

From:

Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Sent:
Wednesday,
July 31,
2019
11:01
AM
To:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>;
Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming
Delay

Can we
please
schedule
a
briefing
ASAP
so we
can
understand
this
better.
In the
meantime,
we

need to
put a
hold on
all
communication
to
stakeholders.
This
looks
like
53,000
students
are out
of
scholarship
and
award
funding.

I am
available
at
12:00
pm,
Jesse
are you
as well?

LC

From:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Sent:
July 31,
2019
10:30
AM
To:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>;
Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming
Delay

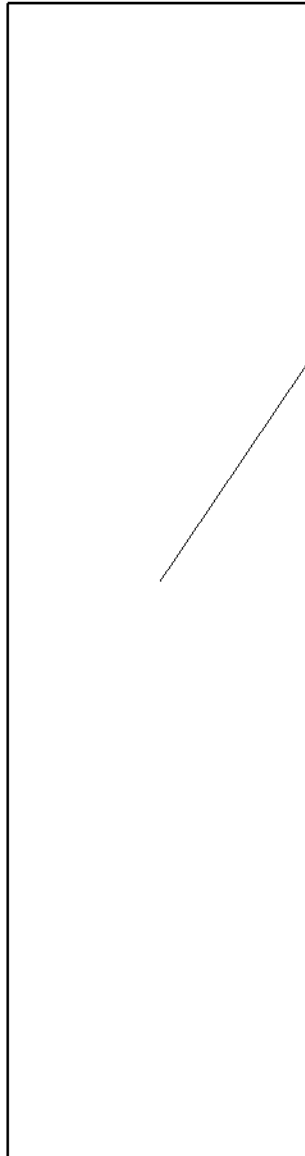24 (1) (a);24(1)(b)(i)
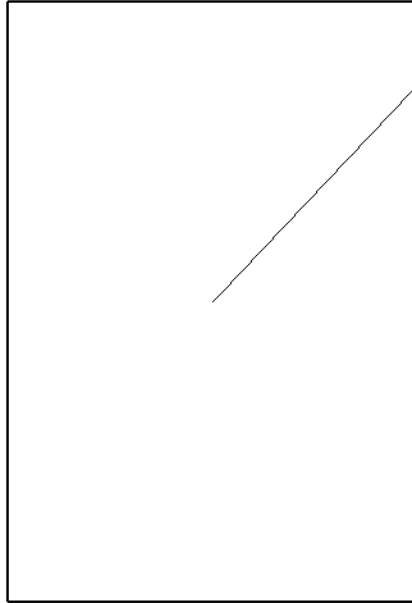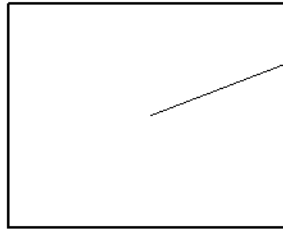
From:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Sent:
Wednesday,
July 31,
2019
10:23
AM
To:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>;
Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>

Subject:
RE:
Scholarship
and

Award
Programming
Delay

LC

From:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Sent:
July 31,
2019
9:40
AM
To:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>;
Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming
Delay

A little
more

info:

<!--
[if
!supportLists]-
-
>●
<!-
-
[endif]-
-
>Existing
legacy
systems
needs
to
be
decommissioned
no
later
than
December,
2019.
<!--
[if
!supportLists]-
-
>o
<!-
-
[endif]-
-
>Support
for
the
server
software
and
hardware
supporting
the
legacy
system
expires
and

cannot
be
extended.

- The
new
system
will
replace
the
existing
legacy
system,
resulting
in
streamlined
processes,
and
automated
functions
that
are
currently
performed
manually
by
student
aid
staff.
<!--
[if
!supportLists]-
-
>o
<!-
-
[endif]-
-
>Students
will
not
see
a
change
with
the

new system. The change is internal facing to staff to allow more efficient processing of Scholarship and Awards.

- Without the new system, manual processes will be required to administer the scholarship and award programs, causing a higher risk of human error, delays in processing payments

to
recipients,
and
increased
inquiries
from
students
and
other
stakeholders.

- Students
and
institutions
have
not
complained
about
the
existing
system
because
it
is
internal
facing.
However,
they
have
indicated
the
following:
    - Scholarships
    should
    be
    consolidated
    to
    reduce
    administration
    for
    the
    students,
    institutions,
    and
    government,
    and

The delivery of scholarships needs to be streamlined to provide greater flexibility for institutions to respond to students' needs and ensure that all funding is maximized.

- At a recent meeting with student leaders, students have also expressed a desire for online self-service functionality for

scholarships
and
awards
(part
of
future
changes
we
hope
to
implement).

From:
Andy
Weiler
Sent:
Wednesday,
July 31,
2019
9:19
AM
To:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>;
Gerald
Kastendieck
<Gerald.Kastendieck@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming
Delay

I've
attached

a DM
briefing
note
from
March
of last
year as
a
starting
point
(points
2 and 3
are still
being
explored).
The
system
changes
are
back-
end
changes
because
of an
aging IT
system
we
currently
use.
Students
(roughly
53,000
and
$97M
budget)
won't
see any
publicly-
facing
change
to the
system.
These
are
operational

changes
we
require
as a
department
to
better
administer
and
deliver
scholarships
and
awards.

24 (1) (a)

it's
operational
work
that
was
identified
as
critical
by the
Student
Aid
sector
as the
current
system
would
no
longer
be
supported
by end
of this
year
and
there

were
serious
concerns
about
the
system
failing
at
some
point (it
also
has no
flexibility
to
accommodate
future
changes
to
scholarships
and
awards
programming).
We've
had
some
delays
but
work
on the
new IT
system
is
progressing
and is
expected
to be
completed
later
this fall
(that's
why we
haven't
identified
a
specific

date).
We
initially
were
hoping
to have
it done
before
August
1.

We had
stakeholder
engagement
(institutions)
about
transformation,
reasons
for it,
issues
with
current
system,
why
change
was
necessary,
and
why
transformation
has to
occur
(streamlining,
automation).
These
reasons
for
improvement
were
stressed
to
stakeholders
when
engaging
with

them.
We
also
spoke
with
student
groups
but
that
was
more
about
the
consolidation/streamlining
of
graduate
scholarships.

From:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Sent:
Wednesday,
July 31,
2019
8:48
AM
To:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Cc:
Jesse
Robertson
<jesse.robertson@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming

Delay

Can
you
also
provide
some
info on
scope?
i.e. how
much
money
and
how
many
people
will be
affected?

I'm
meeting
with
Premier's
Comms
around
10:30
am and
would
like to
be able
to
answer
some
questions.

Thanks,
LC

From:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Sent:
July 31,

2019
8:30
AM
To:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Subject:
RE:
Scholarship
and
Award
Programming
Delay

Will do.
I've
asked
my
team to
pull
together
some
more
info for
you.

From:
Laurie
Chandler
<Laurie.Chandler@gov.ab.ca>

Sent:
Wednesday,
July 31,
2019
9:11
AM
To:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Subject:

Scholarship
and
Award
Programming
Delay

Hi
Andy,

Can
you
please
provide
me
with a
bit
more
background
on this?

i.e.
when
did the
dept
start
switching
over to
the
new
system?
Was
this
initiated
by the
former
government?
How
will this
improve
the
system
for
students?
And
what

were
some
of the
concerns,
particularly
from
students,
that
were
heard
about
the
former
system?

Thanks,

Laurie
Chandler
Press
Secretary
Advanced
Education
780.203.8462

Please see comments on starting up Rutherford. Looks like we need some assitnace from Allan's team. Let me know if you want to proceed when you hear from Andy.

Stacey

From: Leo Amaral <Leo.Amaral@gov.ab.ca>
Sent: August 5, 2019 5:43 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>
Cc: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: Re: Scholarships

Hi Salima

That was the communication. Business needs to make the table changes

Sent from my iPhone

On Aug 5, 2019, at 5:38 PM, Salima Hemani <Salima.Hemani@gov.ab.ca> wrote:

> Hi
> I just called Glenn Steinkie and he confirmed it can be started but has to be done by business so either Doren Pigeon, Calvin Chen or Janet Assaf can turn it on.They all report to Allan OBrien.
> IT doesn't have to do anything.
> Leo, please confirm as this is what was communicated last week as well.
>
> Sent from my iPhone
>
> On Aug 5, 2019, at 5:17 PM, Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca> wrote:
>
> > Ok now we are getting questions. Andy says he want want Rutherford scholarship up tonight. Can we do that?
> >
> > Sent from my iPhone
> >
> > Begin forwarded message:
> >
> > > **From:** Stephen Bull <Stephen.Bull@gov.ab.ca>
> > > **Date:** August 5, 2019 at 5:08:47 PM MDT
> > > **To:** Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
> > > **Subject: Re: Scholarships**

Now getting lots of questions from the DM.

It sounds like, based on your email, that the timing was a business decision not ours?

DM has requested a BN and I indicated I will forward the briefing Adv Ed is creating.

Stephen Bull
Senior ADM & Corporate CIO
Service Alberta

On Aug 5, 2019, at 4:58 PM, Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca> wrote:

> Steve, There is a news story on student scholarships being delayed due to system implementation. There is more to this story from a business perspective. AE comms will be dealing with it on Tuesday. Let me know if you need a copy of the briefing for our DM.
>
> The new scholarship system is currently planned for implementation in the end of October.
> I will send you a link to the news story.
>
> Stacey
> Sent from my iPhone
>
> Begin forwarded message:
>
>> **From:** Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
>>
>> **Date:** August 5, 2019 at 2:34:04 PM MDT
>> **To:** Megan van der Linden <Megan.VanderLinden@gov.ab.ca>, Mallory Nault <Mallory.Nault@gov.ab.ca>, Aneta Rans <Aneta.Rans@gov.ab.ca>, Sarah Mcfatridge <Sarah.Mcfatridge@gov.ab.ca>, Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
>> **Subject: Fwd: Scholarships**
>>
>> FYI

Begin forwarded message:

> **From:** Andy
> Weiler
> <andy.weiler@gov.ab.ca>
>
> **Date:** August 5,
> 2019 at 1:57:35 PM
> MDT
> **To:** Maggie
> DesLauriers
> <Maggie.DesLauriers@gov.ab.ca>
>
> **Subject: Fwd:
> Scholarships**
>
> See below. We'll
> likely have to get
> Rutherford up
> tomorrow. But let's
> connect before
> anything goes live.
> CBC ran a story
> today and there was
> some action on
> twitter. That's
> what's driving this.
> We'll need to
> connect with
> Comms on some
> messaging as well.
>
> Sent from my iPad
>
> Begin forwarded
> message:
>
> > **From:**
> > Rod
> > Skura
> > <rod.skura@gov.ab.ca>
> >
> > **Date:**
> > August
> > 5, 2019
> > at
> > 1:41:51
> > PM
> > MDT
> > **To:**

Demetrios
Nicolaides
<demetrios.nicolaides@gov.ab.ca>

Cc:
Andy
Weiler
<andy.weiler@gov.ab.ca>

Subject:
Re:
Scholarships

Likely
Tuesday

On
Aug 5,
2019
12:37
PM,
Demetrios
Nicolaides
<demetrios.nicolaides@gov.ab.ca>
wrote:
Also
wondering
when
Rutherford
can be
opened

On
Aug. 5,
2019
12:12
p.m.,
Rod
Skura
<rod.skura@gov.ab.ca>
wrote:
Working
on it

On
Aug 5,
2019
8:29
AM,
Demetrios

Nicolaides
<demetrios.nicolaides@gov.ab.ca>
wrote:
Hi
Rod,

Can
you
send
me a
copy
of the
briefing
note on
scholarships?
Was it
always
planned
that the
scholarships
would
open
late
fall as
part of
the
new
system?

Let me know when you are in.

Rod

Sent from my iPad

Begin forwarded message:

> **From:** Demetrios Nicolaides <demetrios.nicolaides@gov.ab.ca>
> **Date:** August 5, 2019 at 11:04:17 PM MDT
> **To:** Andy Weiler <andy.weiler@gov.ab.ca>
> **Cc:** Rod Skura <rod.skura@gov.ab.ca>
> **Subject: Re: Scholarships**

I need you both call me at 8:30 or earlier to resolve the scholarship issue.

Non Responsive

Non Responsive

On Aug. 5, 2019 4:32 p.m., Andy Weiler <andy.weiler@gov.ab.ca> wrote:
Minister, is first thing tomorrow morning to post the Rutherford okay?
but we can move on this very quickly tomorrow morning.
We'll also have to coordinate some messaging for the web and for your office.

Sent from my iPad

On Aug 5, 2019, at 4:07 PM, Demetrios Nicolaides
<demetrios.nicolaides@gov.ab.ca> wrote:

> Please open it immediately as well as other scholarships as
> permissible
>
> On Aug. 5, 2019 3:02 p.m., Andy Weiler <andy.weiler@gov.ab.ca>
> wrote:
> Yes. We can open it at any time this week.
>
> Sent from my iPad
>
> On Aug 5, 2019, at 2:50 PM, Demetrios Nicolaides
> <demetrios.nicolaides@gov.ab.ca> wrote:

>> Just to confirm Andy. Rutherford can be opened at any
>> time?
>>
>> On Aug. 5, 2019 1:48 p.m., Andy Weiler

<andy.weiler@gov.ab.ca> wrote:

I will send the original briefing note on scholarship changes in a separate email. The original plan was to have the IT changes completed by end of July and open up scholarships by the beginning of August. We realized earlier this year we wouldn't hit that date (resourcing issues and some planning challenges) so decision was made to push the date out to October.

Yes, we can open Rutherford any time this week.

Sent from my iPad

> On Aug 5, 2019, at 1:41 PM, Rod Skura <rod.skura@gov.ab.ca> wrote:
>
> Likely Tuesday
>
> On Aug 5, 2019 12:37 PM, Demetrios Nicolaides <demetrios.nicolaides@gov.ab.ca> wrote:
> Also wondering when Rutherford can be opened
>
> On Aug. 5, 2019 12:12 p.m., Rod Skura <rod.skura@gov.ab.ca> wrote:
> Working on it
>
> On Aug 5, 2019 8:29 AM, Demetrios Nicolaides <demetrios.nicolaides@gov.ab.ca> wrote:
> Hi Rod,
>
> Can you send me a copy of the briefing note on scholarships? Was it always planned that the scholarships would open late fall as part of the new system?

From:	Allan OBrien
Sent:	Tuesday, August 06, 2019 9:01 AM
To:	Leo Amaral
Cc:	Steve Sands; Salima Hemani; Stacey Reynhoudt; Lisa LHirondelle; Betty Yeung
Subject:	Re: Scholarships

Follow Up Flag:	Follow up
Flag Status:	Flagged

Thanks Steve!

Sent from my iPhone

> On Aug 6, 2019, at 7:58 AM, Leo Amaral <Leo.Amaral@gov.ab.ca> wrote:
>
> Thanks Steve
>
> -----Original Message-----
> From: Steve Sands <Steve.Sands@gov.ab.ca>
> Sent: August-06-19 8:58 AM
> To: Salima Hemani <Salima.Hemani@gov.ab.ca>
> Cc: Leo Amaral <Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle
<lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
> Subject: RE: Scholarships
> Importance: High
>
> Hi:
>
> We are being instructed to go live with Rutherford at 10:00am. We are just doing a final check to see if all of our
'ducks are in a row'. Once confirmed, we will wait until we get confirmation from Andy before "pressing the button".
>
> Steve
>
> -----Original Message-----
> From: Salima Hemani <Salima.Hemani@gov.ab.ca>
> Sent: Tuesday, August 06, 2019 7:47 AM
> To: Steve Sands <Steve.Sands@gov.ab.ca>
> Cc: Leo Amaral <Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle
<lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
> Subject: Re: Scholarships
>
> Thanks Steve.
> Will wait to hear from you.
>
> Sent from my iPhone
>
>> On Aug 6, 2019, at 7:30 AM, Steve Sands <Steve.Sands@gov.ab.ca> wrote:
>>

1

>> Good morning...
>>
>> I will follow up on this ASAP. Latest direction that was communicated on Friday was that all are still 'On hold', including Rutherford.
>>
>> I will keep you posted.
>>
>> Steve
>>
>>
>>
>> -----Original Message-----
>> From: Salima Hemani <Salima.Hemani@gov.ab.ca>
>> Sent: Tuesday, August 06, 2019 7:25 AM
>> To: Steve Sands <Steve.Sands@gov.ab.ca>
>> Cc: Leo Amaral <Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
>> Subject: Scholarships
>>
>> Hi Steve
>> Since Allan is away can you please us know if Business is turning on Rutherford?
>> Salima
>>
>>
>> Sent from my iPhone

2

From:	Steve Sands
Sent:	Tuesday, August 06, 2019 9:06 AM
To:	_AE-ASA SA Business and Systems Support
Subject:	Rutherford Application - **Update** to the **Update**

Follow Up Flag:	Follow up
Flag Status:	Flagged

Good morning...

Here is the latest:

We are being instructed to go live with Rutherford at 10:00am. Just waiting for confirmation from Andy before "pressing the button". Also in the process of ensuring all is in place from a system and communication perspective.

Steve

From: Steve Sands
Sent: Friday, August 02, 2019 1:38 PM
To: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>
Subject: RE: Rutherford Application - **Update**

Hi:

Just a quick update....

At this point, the direction is to keep the Rutherford application on hold until late fall as per the messaging on the SA Website.

If I hear more, I will update you.

Steve

From: Steve Sands
Sent: Thursday, August 01, 2019 9:05 AM
To: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>
Subject: Rutherford Application

Good morning...

Just a heads up that the Minister has provided direction to open up the Rutherford application earlier than just announced. It may 'go live' as early as today.

No action is required at this time…just a heads up for now…

Steve

2

From:	Maggie DesLauriers
To:	Andy Weiler
Subject:	IMT/business divergence
Date:	Tuesday, August 06, 2019 9:06:11 AM
Attachments:	6AF6E647-302C-4179-B9FA-44BF6917A5A7.docx
	ATT00001.txt

Here is a document that speaks to this further. Stacey and I facilitated a number of meetings to resolve these issues and move forward.

Organizational / Program Transformation & IMT Perspectives

Context for Discussion

Purpose: To understand the divergence in expectations and approach when it comes to transformation activities and system development, and to reach shared understanding for the approach going forward. Understanding that there has been significant investment in SFS to date, at what point will past investment be outweighed by the requirements of the future?

Scholarships Vision: *Complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.*

IMT direction is to implement flexible, modular, scalable, enterprise-wide solutions.

Student Aid expectation is that the Scholarships Transformation IT solution would be the pilot project to position Student Aid for the future where we are slowly decoupling from SFS using the modular approach. This seems to be in conflict with the approach of leveraging SFS wherever possible:

- ***There are key functions where SFS is not working well for loans and grants.***
    - One example is Confirmation of Registration (COR) – it was developed in 2005 and hasn't been reviewed or enhanced since that time. There was a release planned for 2019 to address the numerous tickets all relating to COR, but it was bumped due to other priorities.
    - The Scholarships Project has uncovered that existing COR doesn't work for Scholarships. What will be the approach: Redevelop existing COR to meet all business requirements for all users or create a new COR solution for Scholarships?
- ***The lens with which we approach prioritization of requirements and solution design should be explored:***
    - Business lens: Develop what's needed to meet the scholarship transformation vision.
    - IMT lens: Leverage SFS wherever possible, consider return on investment (e.g. developing system function for low volume scholarships)
    - Conflict could be summarized as: Why will the existing component not meet the current requirements vs. a modular, flexible, future-focused system
- ***How is ROI measured?***
    - For example, how does the investment to automate low volumes of scholarship processes or re-build functionality compare with the benefit of having seamless delivery and data in 1 system?
- ***Does Student Aid have a vision for continuous system improvement and how do we achieve that?***

Comparison: IMT Project Charter and Scholarships Project Charter

IMT Project Charter	Business Assumption/Understanding	Scholarship Project Charter
Primary Focus – Migrate LSFS data and develop core foundation components - will address opportunities for system improvements and better alignment with existing or new business processes **Vision** – a modular development of only the new scholarship core components, develop on SFS foundation, port modules outside of SFS, align with SOA, deploy independently of SFS.	The Scholarship Transformation project was the pilot to position SA for future where we slowly decouple from SFS using modular approach. Functionality such as Correspondence, COR, Payments, will become enterprise solutions that existing SFS applications and Scholarship programs can tap into in the future.	**Primary Focus –** create improvements for the business area in alignment with Student Aid's vision and mission and scholarships and awards programs long-term vision **Vision -** *Complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.*
Assumptions – Part 1 can't be port of legacy scholarships. Business automation is to be investigated and implemented **where applicable.** - SFS will be utilized for processing and management of scholarships until ERP systems are developed	The concept of **"where applicable"** has become a grey area for the team. Business may warrant the automation of functionality that impacts lower volumes if it means we can deliver these scholarships faster and set ourselves up for the future.	System is flexible and agile, programs and services are accessible in one location/through single point of contact, operational/back end processes are automated where possible. Information is communicated appropriately and readily available. Applications are effectively designed and online. Policies, processes, and procedures are client-centered, efficient, and cost-effective.
Provide a single and consistent scholarships solution with as much isolation from the loans and grants solution as possible while reusing appropriate SFS functionality.	Develop a system solution where users can do their work in one space. Leveraging SFS components resulted in users jumping from Scholarship solution to SFS screens. Calling functionality from Scholarship solution is not always possible, as SFS was not built that way. What happens when reusing appropriate SFS functionality is not appropriate? (ex. Correspondence and COR)	
Align processes and procedures between SA loans, grants, scholarships where appropriate.	Throughout the course of the project it has been realized that less alignment is possible given the Scholarship Programming. Statuses of applications or certain processes are triggered at different times which don't align with what exists on SFS today. The move of Rutherford has informed the team that certain functionality would be lost that exists currently in SFS (ex. Review linking, e-doc MI alerts) Business assumption was that when we move Rutherford, functionality that supports its effective delivery would be addressed in the scholarship solution. If there is functionality that aids users in delivery, that same functionality would exist in scholarships.	Programs are accountable and processes are transparent.
Scope – project will include engagements to SFS, integration with current SFS functionality, and development of new scholarship features and components. **Wherever possible, reuse or extend existing SA functionality.**	Business understood that to mean that we would reuse functionality if it met business requirements. If business requirements are not met, we would look at building functionality to support them or build functionality in new solution. Scholarships requires different triggers in the system when it comes to inbox, correspondence, communication and notifications to students and COR. What has occurred as a result of leveraging SFS functionality, is Scholarships is required to use functionality that does not align with its business processes. Until Student Aid, as a whole, creates a project to address gaps – as this functionality is now shared across all departments – Scholarships will have to live with the limitation because of leveraging functionality that was not initially built with Scholarships in mind.	**Scope – develop and document future state as it relates to:** - Student Aid Scholarship delivery mandate - program mandate, audience, and outcome, including eligibility criteria - simplify process and procedures, intake methods and deadlines - standardize documents and communication mechanisms - assess organizational structure

From:	Aneta Rans
To:	Megan van der Linden; Stacey Reynhoudt; Steve Sands; Mira Quintin; Eve Anderson; Shaune Labrecque; Mallory Nault; Sarah Mcfatridge; Damaris Neumann
Cc:	Maggie DesLauriers; Allan OBrien; Shauna Kent; Christine Salloum; Launa Lebeau; Lindsay Leong
Subject:	RE: Scholarships Update
Date:	Tuesday, August 06, 2019 9:11:44 AM
Attachments:	image002.png

One small correction.

.

Aneta Rans
Manager, Scholarship Delivery and Transformation
Alberta Scholarships and Awards
Alberta Student Aid, Advanced Education
(780) 427 – 7859
www.studentaid.alberta.ca

Alberta ⏺ Student Aid

From: Megan van der Linden <Megan.VanderLinden@gov.ab.ca>
Sent: Tuesday, August 06, 2019 9:08 AM
To: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>; Aneta Rans <Aneta.Rans@gov.ab.ca>; Steve Sands <Steve.Sands@gov.ab.ca>; Mira Quintin <Mira.Quintin@gov.ab.ca>; Eve Anderson <Eve.Anderson@gov.ab.ca>; Shaune Labrecque <Shaune.Labrecque@gov.ab.ca>; Mallory Nault <Mallory.Nault@gov.ab.ca>; Sarah Mcfatridge <Sarah.Mcfatridge@gov.ab.ca>; Damaris Neumann <Damaris.Neumann@gov.ab.ca>
Cc: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Shauna Kent <shauna.kent@gov.ab.ca>; Christine Salloum <christine.salloum@gov.ab.ca>; Launa Lebeau <Launa.Lebeau@gov.ab.ca>; Lindsay Leong <Lindsay.Leong@gov.ab.ca>
Subject: Scholarships Update

Hi All

We had a conversation with Andy this morning and received some direction on how the MO and DMO want to handle scholarships.

Rutherford:

- Plan is to go live with the online application at 10:00, if possible.
- We need to wait for final confirmation from Andy before proceeding. I will email everyone when I get the final nod.
- We need to loop back to re-request the funds for the account.
- Students will be paid as they work through the system.

18 Application Scholarships

- Plan is to have the applications available online by the end of the day.

- Will not be available to be paid until the new scholarship system is active.

- We'll be getting ready with Aneta's team and Shaun's team to process and comms.

Contract Based Scholarships

- No budget decisions have been made, but expect these to go forward, and begin the government side activities to get these ready to go.
- An estimate of 4-6 weeks has been shared with DMO and MO on these, since we have many steps and committee approvals to work through.
- We've reached out to EDT to see if they plan to provide their usual funding to Alberta Innovates.

Communications

- Andy is working with Comms to provide messaging that makes it clear we are responding to public concern while still underscoring that the technology solution delay.

Any questions, please let me know. I'll keep everyone posted with any new developments. Thanks for handling all the quick changes.

Megan van der Linden, CPA, CMA
Director, Portfolio Management, Accountability and Operations
Apprenticeship and Student Aid
Advanced Education
Government of Alberta

Tel   780-644-1170
Cell 780-218-2969
megan.vanderlinden@gov.ab.ca

Alberta
Government

← **Demetrios Nicolaides** 📞 ⋮

Tuesday • 9:38 a.m.

Goodmorning, quick question, who did you speak to in premier's office who said not to open scholarships?

Tue. 9:38 a.m.

Tuesday • 11:41 a.m.

Mitch Gray in Finance. Because it's part of the budget, we can't release it yet.

Tue. 11:41 a.m. • SMS

Text message

SMS

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Has been reviewed by Laurie.

Alexander Rutherford Scholarship

Issue:
Government of Alberta is relaunching the Alexander Rutherford Scholarship.

Key Messages:

- Effective immediately, the Rutherford Scholarship is open and accepting applications. Students and parents can rest assured that all eligible students will receive their awards on time and as normal without any delay or interruption.

- I want to be clear, the Rutherford Scholarship should never have been implicated by the technology upgrade.

- There was miscommunication within the department and when I found out, I took immediate steps to address this to ensure that this important service was available to students across Alberta.

- Students and parents no longer need to worry about application deadlines for the Rutherford Scholarship.

- Again, the Rutherford Scholarship is open and students can apply normally and expect processing and payments to occur as normal.

- I am working closely with my department officials to ensure there are no further complications as the new IT system is rolled out.

Roll out strategy
- Minister's statement
- Social media support
- Update to web
- Emails to scholarship partners notifying them of the change to Rutherford

Key Facts
Alexander Rutherford Scholarships in 18/19:

- 23,390 students applied for the Rutherford
- 19,024 students received the Rutherford
- Total funding for the Rutherford - $39,013,600

Q/A
1. What about the other scholarships?

ADVICE TO PREMIER/MINISTER
WHEN COMPLETED DOCUMENT IS PROTECTED A

- Those scholarship applications are impacted by the work that continues on a new IT solution to replace the aging legacy system that will be decommissioned at the end of December.
- We will have an update on the availability of those applications as the work progresses.
- I want to stress that application deadlines and payment deadlines will not be impacted by this work.

2. Why did we just find out about these changes?
- The department has been working on IT changes for several months. There were a number of unforeseen delays that resulted in the project getting pushed out several months impacting those other scholarships.
- Rutherford should not have been impacted.
- There was miscommunication within the department and when I found out, I took immediate steps to address this to ensure that this important service was available to students across Alberta.
- Students and parents no longer need to worry about application deadlines for the Rutherford Scholarship.
- There was a miscommunication within the department which has been clarified and has resulted in the Rutherford Scholarship application being made available today.

3. Are these changes related to budget deliberations?

24 (1) (a)

- We are in the midst of budget deliberations and are also awaiting the results of the McKinnon Panel's report which will be looking at all of government's expenses.

From:	Calvin Chen
Sent:	Tuesday, August 06, 2019 3:01 PM
To:	Steve Sands
Cc:	_AE-ASA SA Business and Systems Support; Salima Hemani; Leo Amaral; Allan OBrien; Lisa LHirondelle; Betty Yeung
Subject:	RE: Rutherford - Going live at 3:00 pm today!
Follow Up Flag:	Follow up
Flag Status:	Flagged

Hi,

Rutherford access is now 'ON':

Calvin

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, August 06, 2019 2:58 PM
To: Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
Subject: RE: Rutherford - Going live at 3:00 pm today!

Hi Calvin:

Please **turn ON Rutherford at 3:00. Full steam ahead!**

Steve

From: Calvin Chen <Calvin.Chen@gov.ab.ca>
Sent: Tuesday, August 06, 2019 2:56 PM
To: Steve Sands <Steve.Sands@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>; Leo Amaral

1

<Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
Cc: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>
Subject: RE: Rutherford - Going live at 3:00 pm today!

Hi Steve,

Does ITS Team need **final instruction to turn ON Rutherford** or do we proceed at 3:00pm as stated below by Aneta?

Calvin

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, August 06, 2019 2:55 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Allan OBrien <allan.obrien@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
Cc: _AE-ASA SA Business and Systems Support <AE-ASASABusinessandSystemsSupport@gov.ab.ca>
Subject: Rutherford - Going live at 3:00 pm today!
Importance: High

From: Aneta Rans <Aneta.Rans@gov.ab.ca>
Sent: Tuesday, August 06, 2019 2:52 PM
To: Steve Sands <Steve.Sands@gov.ab.ca>; Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl <Brad.Schnabl@gov.ab.ca>; Jennifer Xiao2 <Jennifer.Xiao2@gov.ab.ca>
Subject: RE: Rutherford

Direction has been given to go live with Rutherford for 3:00.

Aneta Rans
Manager, Scholarship Delivery and Transformation
Alberta Scholarships and Awards
Alberta Student Aid, Advanced Education
(780) 427 – 7859
www.studentaid.alberta.ca

<< OLE Object: Picture (Device Independent Bitmap) >>

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, August 06, 2019 10:55 AM
To: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>

2

Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl
<Brad.Schnabl@gov.ab.ca>; Jennifer Xiao2 <Jennifer.Xiao2@gov.ab.ca>
Subject: RE: Rutherford

Still waiting to hear....just fyi...

From: Steve Sands
Sent: Tuesday, August 06, 2019 9:24 AM
To: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Rosa Mejia
<Rosa.Mejia@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl
<Brad.Schnabl@gov.ab.ca>; Jennifer Xiao2 <Jennifer.Xiao2@gov.ab.ca>
Subject: RE: Rutherford

Thanks!

I think we are good. Just waiting on 'official word'

Steve

From: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>
Sent: Tuesday, August 06, 2019 9:23 AM
To: Janet Assaf <janet.assaf@gov.ab.ca>; Steve Sands <Steve.Sands@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>;
Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl
<Brad.Schnabl@gov.ab.ca>; Jennifer Xiao2 <Jennifer.Xiao2@gov.ab.ca>
Subject: RE: Rutherford

Jennifer will manually run the **transcript job each morning until 19.1 is implem**ented.

Brad has confirmed that the **missing course process is as you have stated.**

Glenn

From: Janet Assaf <janet.assaf@gov.ab.ca>
Sent: August-06-19 9:04 AM
To: Steve Sands <Steve.Sands@gov.ab.ca>; Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Rosa Mejia
<Rosa.Mejia@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl
<Brad.Schnabl@gov.ab.ca>
Subject: RE: Rutherford

Hi Steve

3

We are good to go on our end, once we hear we will turn it on.

Thanks
Janet

From: Steve Sands <Steve.Sands@gov.ab.ca>
Sent: Tuesday, August 06, 2019 8:55 AM
To: Glenn Steinke2 <Glenn.Steinke2@gov.ab.ca>; Rosa Mejia <Rosa.Mejia@gov.ab.ca>; Janet Assaf <janet.assaf@gov.ab.ca>; Calvin Chen <Calvin.Chen@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Kevin Jacko <kevin.jacko@gov.ab.ca>; Brad Schnabl <Brad.Schnabl@gov.ab.ca>
Subject: Rutherford
Importance: High

Hi:

We are being instructed to go live with Rutherford at 10:00am, and plan to do so once we get confirmation from Andy before "pressing the button".

There were a flurry of emails on this last week. I just want to confirm we are good to go once we hear?.

Glenn, you put this together last week:

It is my understanding that:
1. ITS will flip a switch and students will be able to enter Rutherford applications. Janet / Calvin is this statement true?
2. ITS is there anything else you need to do?
3. SA AMS will need to manually run the transcript job on a daily basis until Release 19.1 is implemented.
4. Brad is there anything else that we need to do?
5. Karen and Aneta is there any risk that implementing Rutherfords early will impact the fall Scholarships implementation?

As far as Rutherford missing courses, my understanding is that we can request to run the pre-assessment process in order to get the report for missing courses, after the Retrieve Transcript batch job has been completed successfully. We can initiate this once we have learners in the system.

As far as I know, we should be ok?!

Steve

From: Megan van der Linden
To: Andy Weiler; Natasha McKenzie; Aneta Rans
Cc: Maggie DesLauriers
Subject: RE: Rutherford application
Date: Tuesday, August 06, 2019 3:02:10 PM

Steve says we're live!

From: Andy Weiler <andy.weiler@gov.ab.ca>
Sent: Tuesday, August 6, 2019 2:57 PM
To: Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>; Megan van der Linden <Megan.VanderLinden@gov.ab.ca>; Aneta Rans <Aneta.Rans@gov.ab.ca>
Cc: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Subject: RE: Rutherford application

See below. Can someone provide a "it's gone live" email? Thanks
a

From: Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>
Sent: Tuesday, August 06, 2019 2:54 PM
To: Andy Weiler <andy.weiler@gov.ab.ca>
Subject: RE: Rutherford application

Please let me know when we are live and I will send the statement.

Thank you

From: Andy Weiler <andy.weiler@gov.ab.ca>
Sent: August-06-19 2:51 PM
To: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>; Megan van der Linden <Megan.VanderLinden@gov.ab.ca>; Aneta Rans <Aneta.Rans@gov.ab.ca>; Natasha McKenzie <Natasha.McKenzie@gov.ab.ca>
Cc: Rod Skura <rod.skura@gov.ab.ca>; Gerald Kastendieck <Gerald.Kastendieck@gov.ab.ca>; Warren Goertzen <warren.goertzen@gov.ab.ca>
Subject: Rutherford application

Direction has been provided by the Minister's Office so please have the Rutherford Scholarship application go live at 3:00. A statement will be issued at that time as well.

Thanks everyone.

Andy Weiler
Assistant Deputy Minister
Apprenticeship and Student Aid
Government of Alberta

(O) 780-644-7732
(M) 780-719-9325

fyi

From: Salima Hemani <Salima.Hemani@gov.ab.ca>
Sent: August 6, 2019 4:39 PM
To: Amy Hewko <Amy.Hewko@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Betty Yeung <betty.yeung@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

Hi Amy,
Please see below:

1) From an IT infrastructure perspective, Rutherford Scholarships could have been available on August 1st as per the normal Student Aid Business. The IT Modernization project had no impact on the decision related to the delay.

2) The Scholarship IT initiative launched in February of 2018 and is due to be implemented late Fall of 2019. This is a modernization project to replace the legacy scholarships system which will be unsupported as of December 31st 2019. Student Aid Business is also undergoing a Business transformation project which is running in parallel with the IT project. From the IT project delivery perspective we have encountered several challenges:

   a. Business transformation running in parallel to IT project contributed to delay in scope and requirements finalization.
   b. Unexpected complexities resulting from the new technology platform being adopted for this project.
   c. Changes in the Contingent Labour Procurement practice impacted the existing project team and resulted in turnover which contributed to schedule impacts.

Thanks
Salima Hemani
Associate Director, Student Services
Business Relationship Management
Workforce Development IMT Sector
Office of the Corporate Chief Information Officer
Service Alberta
Cell Phone: 780-446-1916
Email: salima.hemani@gov.ab.ca

♨ Please consider the environment before printing this email.

From: Amy Hewko <Amy.Hewko@gov.ab.ca>
Sent: August 6, 2019 4:30 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>

Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

HI Salima,

Thanks for the quick call to clarify what you meant by "response" in your email. That phrase tends to take on a more public connotations in my area.
Looking forward to receiving the information, as briefly discussed.

Amy Hewko
Communications advisor
Service Alberta
Communications and Public Engagement
Government of Alberta

T: 780-427-4893
M: 587-785-3307
E: amy.hewko@gov.ab.ca

Alberta■

From: Amy Hewko
Sent: Tuesday, August 06, 2019 4:10 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

I'm in SA Comms. Can you clarify what the response is for?

I reviewed the documents that Stacey was kind enough to provide. I'm just hoping for a quick update from the IT point of view.

Amy Hewko
Communications advisor
Service Alberta
Communications and Public Engagement
Government of Alberta

T: 780-427-4893
M: 587-785-3307
E: amy.hewko@gov.ab.ca

Alberta■

From: Salima Hemani <Salima.Hemani@gov.ab.ca>
Sent: Tuesday, August 06, 2019 4:01 PM
To: Amy Hewko <Amy.Hewko@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>

Subject: RE: Rutherford scholarship - tech delays - confidential

I am drafting a response right now. Once Stacey has reviewed it will share with you.
Are you currently working AE Comm?

Thanks
Salima Hemani
Associate Director, Student Services
Business Relationship Management
Workforce Development IMT Sector
Office of the Corporate Chief Information Officer
Service Alberta
Cell Phone: 780-446-1916
Email: salima.hemani@gov.ab.ca

🖐 Please consider the environment before printing this email

From: Amy Hewko <Amy.Hewko@gov.ab.ca>
Sent: August 6, 2019 3:59 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

Thanks for the correction.
Looking forward to getting an update. When can I expect your call?

Amy Hewko
Communications advisor
Service Alberta
Communications and Public
Government of Alberta

T: 780-427-4893
M: 587-785-3307
E: amy.hewko@gov.ab.ca

Alberta ▪

From: Salima Hemani <Salima.Hemani@gov.ab.ca>
Sent: Tuesday, August 06, 2019 3:00 PM
To: Amy Hewko <Amy.Hewko@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

Thanks Amy.
I just want to clarify it would be Advanced Education and not Education.
I will get in touch with you.

Thanks

Salima Hemani
Associate Director, Student Services
Business Relationship Management
Workforce Development IMT Sector
Office of the Corporate Chief Information Officer
Service Alberta
Cell Phone: 780-446-1916
Email: salima.hemani@gov.ab.ca

🖨 Please consider the environment before printing this email.

From: Amy Hewko <Amy.Hewko@gov.ab.ca>
Sent: August 6, 2019 3:55 PM
To: Salima Hemani <Salima.Hemani@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

Either by email or phone would be great. I'm just trying to get a bit more information on what, exactly, the issue is and whether there was anything SA could have done to prevent it from happening.

As noted in my original email, SA speaks to IT infrastructure as a whole.

I saw that Education released a media statement was released at approx. 3:15 this afternoon.

Amy Hewko
Communications advisor
Service Alberta
Communications and Public Engagement
Government of Alberta

T: 780-427-4893
M: 587-785-3307
E: amy.hewko@gov.ab.ca

Alberta

From: Salima Hemani <Salima.Hemani@gov.ab.ca>
Sent: Tuesday, August 06, 2019 3:46 PM
To: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>; Amy Hewko <Amy.Hewko@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential

Hi Amy, What is the best way to reach you?

Thanks
Salima Hemani
Associate Director, Student Services
Business Relationship Management
Workforce Development IMT Sector
Office of the Corporate Chief Information Officer
Service Alberta
Cell Phone: 780-446-1916
Email: salima.hemani@gov.ab.ca

🖶 Please consider the environment before printing this email.

From: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Sent: August 6, 2019 3:38 PM
To: Amy Hewko <Amy.Hewko@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>
Cc: Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>
Subject: RE: Rutherford scholarship - tech delays - confidential
Importance: High

Salima, please connect with Amy based on the direction from Student Aid. Amy, in the meantime you can let Neil know that the AE comms and Student Aid have been managing the comments.

Stacey

From: Amy Hewko <Amy.Hewko@gov.ab.ca>
Sent: August 6, 2019 9:04 AM
To: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Subject: Rutherford scholarship - tech delays

Hi Stacey,

I'm with SA Comms. My director asked me to connect with a member of your team to learn a bit more about the IT issues that are delaying the Rutherford Scholarship for high school students.

I'm trying to determine whether we should put together some messages for our minister in case we receive inquiries. For reference, Service Alberta speaks to IT infrastructure concerns, but Education will speak to the specific impacts of the delay.

Thanks.

Amy Hewko
Communications advisor
Service Alberta
Communications and Public Engagement

Government of Alberta

T: 780-427-4893
M: 587-785-3307
E: amy.hewko@gov.ab.ca

Alberta

From:	Maggie DesLauriers
To:	Andy Weiler
Subject:	Fwd: Scholarships delay BN
Date:	Wednesday, August 07, 2019 4:43:07 PM
Attachments:	2019 08 02 Scholarships Project Update v1.pptx
	ATT00001.htm

FYI

Begin forwarded message:

> **From:** Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
> **Date:** August 7, 2019 at 3:18:40 PM MDT
> **To:** Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
> **Subject: FW: Scholarships delay BN**
>
>
> See my email to Steve on Sunday...
>
>
> **From:** Stacey Reynhoudt
> **Sent:** August 5, 2019 8:27 PM
> **To:** Stephen Bull <Stephen.Bull@gov.ab.ca>
> **Cc:** Betty Yeung <betty.yeung@gov.ab.ca>
> **Subject:** RE: Scholarships delay BN
>
>
> **Was a request to extend those people submitted?** We (WFD) reviewed and decided it was best to replace the resources with CGI resources. We couldn't get our requests through fast enough to be approved. The process changes on contract approvals throughout end of May and June really impacted our WFD development teams in May and June.
>
> - <!--[if !supportLists]-->•   <!--[endif]-->One UAT coordinator (May 31) – "Sriram Vancheeswaran" Was in a first package (end of May) was rejected for more information. Then was approved with ERP submission. During the delay a UAT tester backfilled this role. CGI is now filling this role.
> - <!--[if !supportLists]-->•   <!--[endif]-->Two developer - (June 30, September 30- running out of hours) – Due to delays in approvals we made a conscious choice to back fill with CGI.
> - <!--[if !supportLists]-->•   <!--[endif]-->One business analyst (July 31) – Tyler Zutz expired last Wednesday. We made a conscious choice to run with one business analyst (Karen Kupchenko) since requirements are almost complete and the remaining can be completed with one resource.
> - <!--[if !supportLists]-->•   <!--[endif]-->One project manager (June 30) Troy Kalita who resigned for another opportunity on June 25. CGI provided a new project manager with a known resource from the Apprenticeship program with senior PM experience.

<!--[if !supportLists]-->• <!--[endif]-->Solution Architect (May 31) – Michael Kang – contract expired and had to be retendered. Has not been submitted yet for approval due to resourcing strategy changing. There is a request from the team to engage Michael for under $10k for performance tuning activities until development is complete.

Did the write-up indicate the importance of these roles? It has taken practice to ensure the importance of these roles are understood.

When did we find out that we are adding more resources? We are not really adding more resources. We are replacing contingent labour contracts with CGI resources. The new CGI project manager reviewed the project and determined that we could change the system testing and UAT testing strategy in order to crash the project timeline.

Apprenticeship and Student Aid (ASA) has two separate team contracts with CGI (amendments due in December). We are making a strategic move now on resourcing for development projects since we have heard that long term contingent labour contracts will not be approved. As a result, it is important that we work with Enterprise Services on approvals for the CGI amendments.

Project delays resulted from:
<!--[if !supportLists]-->• <!--[endif]-->Business not agreeing to the scope and requirements not being finalized. The primary business owner returned from a leave in May and now the scope decisions are made faster.
<!--[if !supportLists]-->• <!--[endif]-->Changing the IMT resources from contingent labour to CGI resources. Transition of knowledge was required.

The decision to delay this project from July to October was a joint business and IMT decision. Attached is the slide deck from our steering meeting on Friday.
Let me know what other questions you have.

Stacey

-----Original Message-----
From: Stephen Bull <Stephen.Bull@gov.ab.ca>
Sent: August 5, 2019 6:57 PM
To: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Cc: Betty Yeung <betty.yeung@gov.ab.ca>
Subject: Re: Scholarships delay BN

So things like this:

Several contracted IMT resources that were serving in critical positions have expired and not been renewed.

Was a request to extend those people submitted? Was it rejected? Did the write-up indicate the importance of these roles?

The BN basically makes it sound like OCCIO's fault for a number of items.

Stephen Bull
Senior ADM & Corporate CIO
Service Alberta

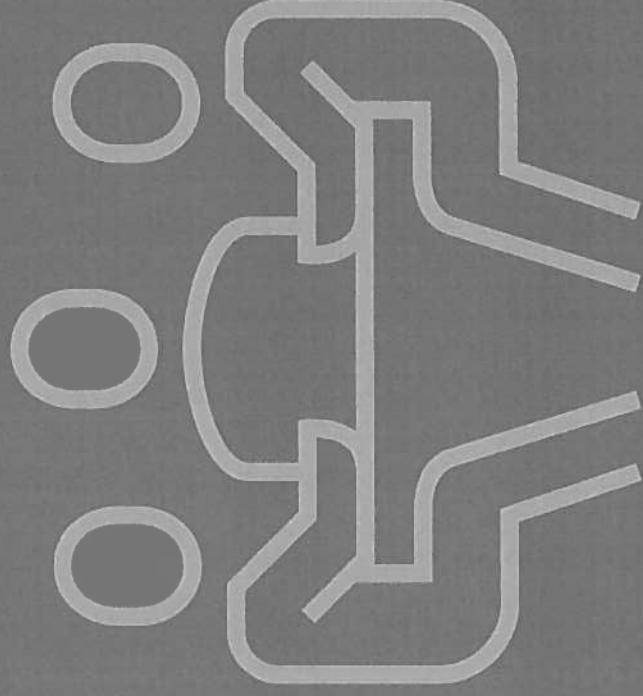> On Aug 5, 2019, at 6:41 PM, Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca> wrote:
>
> Several contracted IMT resources that were serving in critical positions have expired and not been renewed.

Student Aid Scholarships

IMT Project Update
Business Transformation Update

August 02, 2019

Alberta

Agenda

1. IMT Project Status Update

2. Business Status Update and Impacts

3. AIT Scholarships

4. ERP Impacts on Transferring Programs

Alberta

2

Scholarships Part 1

Resources

IMT Status Update

- Resource on-boarding
  - Rakesh Kumar – Senior Developer
  - Luc Tremblay – Senior Developer
  - Mike Gear – UAT Coordinator
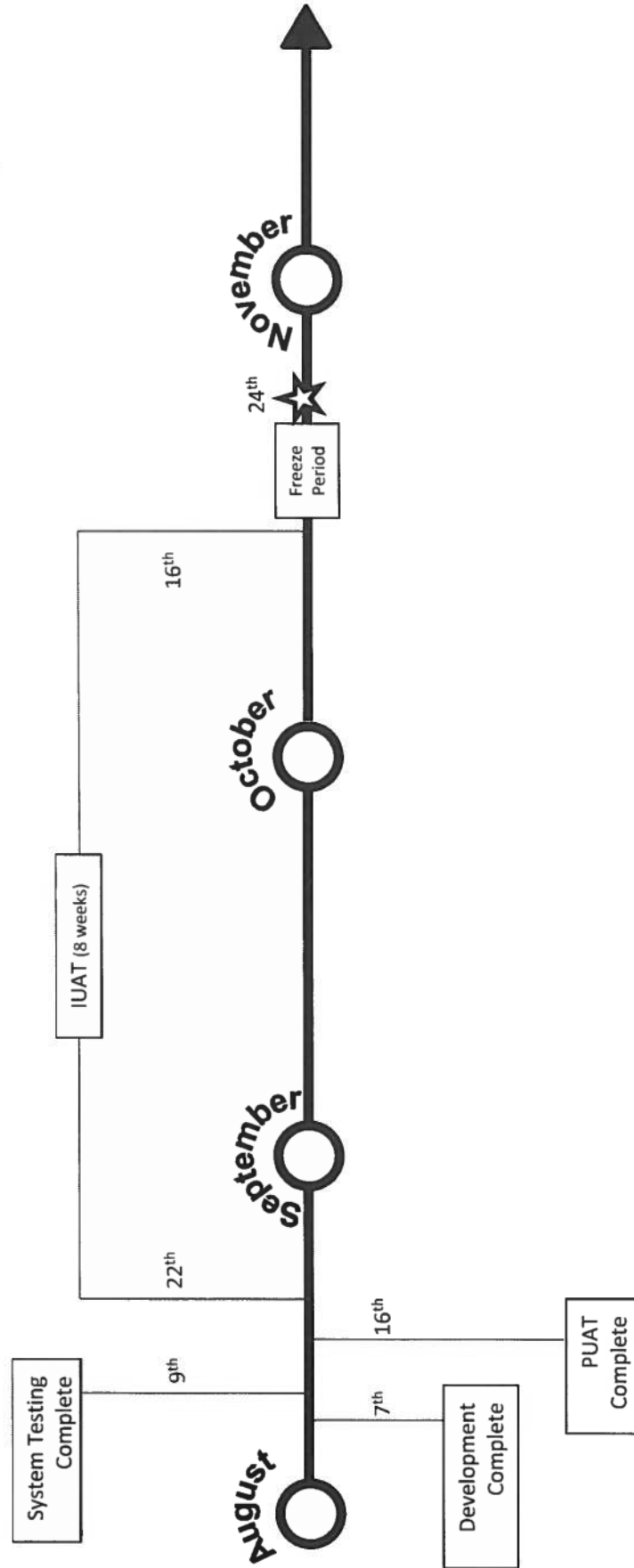
Alberta

4

IMT Resource Challenges – July/August Impacts

- Tyler Zutz – Business Analyst – Contact ended 31-July
  - Reassigned duties to Karen Kupchenko (Business Analyst)

- Steve Yang– Senior Developer – Contract ending 07-Aug
  - Replacement resource on boarded – Rakesh Kumar
  - Knowledge sessions in progress

Alberta

Scholarships Part 1

Schedule

Scholarships Part 1 – Original Schedule

Timeline diagram showing:
- **August** — System Testing Complete (9th), Development Complete (7th)
- **September** — PUAT Complete (16th)
- IUAT (8 weeks) — 22nd
- **October** — 16th
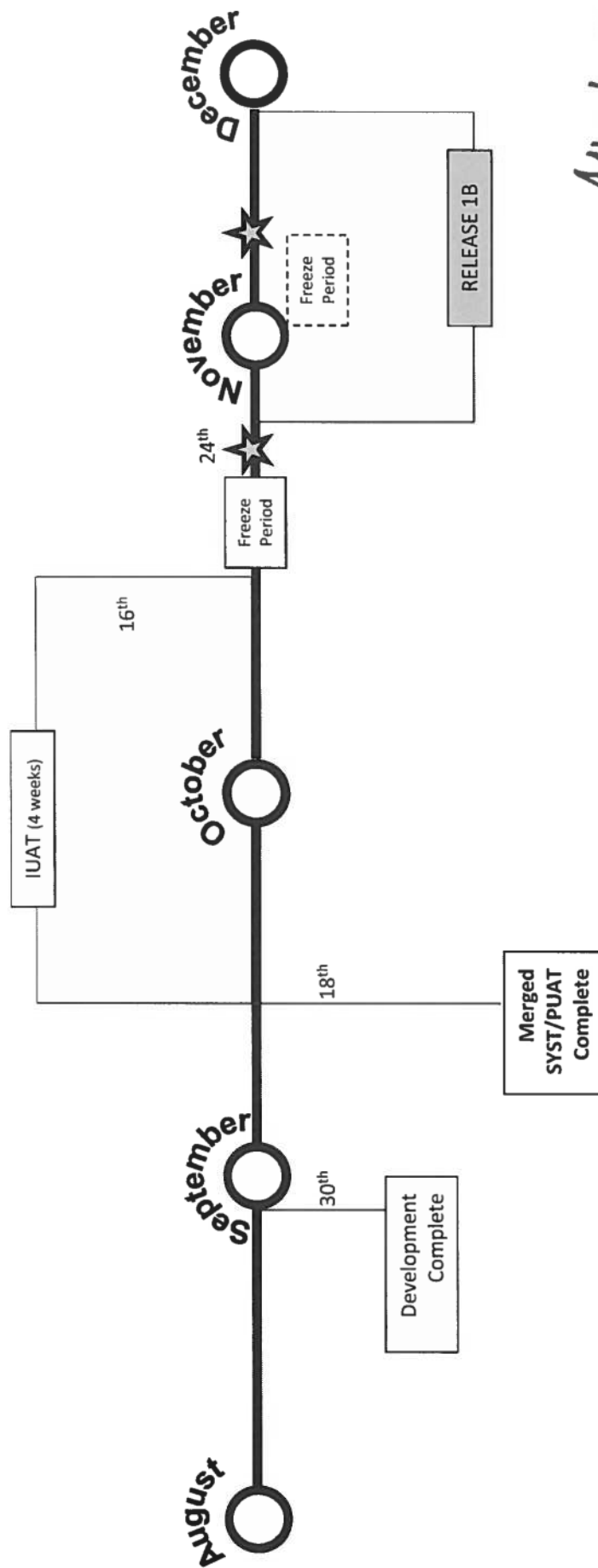- **November** — Freeze Period (24th)

Alberta

Scholarships Part 1 – Original Schedule

Schedule Considerations:

- The schedule was based on all resources (including developers and architect) and CR02.

Issues (as of July 2019):

- About 950 hours of development effort remaining to complete.
- System testing is behind and estimated about 700 hours of remaining effort to complete.
- About 150 open defects to be resolved before implementation.
- Performance testing scheduled in August. Estimates to be created once the issues are identified.
- The schedule for System Testing and PUAT not enough post the development complete date.
- 8 weeks of IUAT results in reserving the production implementation pipeline for long period of time.

Alberta

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Scholarships Part 1 – Revised Schedule

August — **September** — **October** — **November** — **December**

- 30th — Development Complete
- 18th — Merged SYST/PUAT Complete
- 16th — IUAT (4 weeks)
- 24th — Freeze Period
- Freeze Period
- RELEASE 1B

Scholarships Part 1 – Revised Schedule

Schedule Changes:

- Development and existing bug fixes estimated to complete by 30th August.
- Shorten the IUAT period to 4 weeks allowing production pipeline to be available for other releases.
- Extend the System testing and PUAT to improve the quality of the application.
- Increased system testers from 1.5 FTE to 3 FTE.
- On-boarded two Senior Developers to replaces the exiting developers.

Considerations requiring further consultation:

- Defer the following components to Release 1B. Estimates is TBD. Schedule is TBD
  - Admin Screen(s)
  - Auto Rejection Batch Job (Workaround to reject from ProApp individually).
  - Application Disbursement Management (ADM) screen changes.
  - Unit Testing coverage and optimization
  - Documentation (Application and Architecture)
- Merge System Testing and Project UAT to execute at same time.
- Additional resources for PUAT
- Investigate additional resource to optimize the application performance.

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Scholarships Part 1

Financials

Scholarships Part 1 – Financials

Description	Amount
Total Budget	$2,968,983
Actuals (as of July 31st)	$2,096,673
Remaining Budget	$872,310
Forecast to complete	$673,176
Budget variance upon completion	$199,135 (remaining)

Alberta

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Student Aid Project Risks

- **Transformation Impacts** - Continued transformation of scholarship types and business processes while Scholarship solution development is underway puts schedule and scope at risk.

- **Requirement Prioritization** - If requirement prioritization is not focused on meeting core functionality requirements, there is risk that the project schedule and budget could be impacted.

- **Resource Constraints** - A number of scholarships technical resources may be impacted by the GoA contract approval processes. Starting the end of May with the SA Program Manager, UAT Coordinator, and project Architect. June will see impacts to the Project Manager and one senior Developer. One BA is rolling off from the project at the end of July and one developer completing the contract hours by first week of August.

- **Testing Schedule:** The schedule of PUAT and IUAT testing can impact the project implementation date. Discussion in progress to get the schedule plan for testing.

- **External project implementation risk** – The schedule for Scholarships – Part 1 project is adjacent to another critical project – eConsent. Any change in the schedule or priorities can impact the project implementation date.

- PSS implementation support – The resource shortage in the PSS team may impact the IUAT and production implementation activities.

Scholarships Part 1

Business Updates and Impacts

Student Aid Mitigation

- AMS leading the activities related to legacy SFS.
- Legacy Hugh will be kept operational and fully supported till December 31, 2019.
  - Tax slips will be generated in December using HUGH.
  - Production HUGH will be migrated 12-August to GOA.
- Mini-Hugh being established to support
  - Rutherford Forecasting
  - Scholarships inquiry

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Business Status Update

- Deputy Minister Briefing – Program Delay Communication Plan

- Scholarship Applications up late fall

- As soon as budget is confirmed (Oct 22) and system is available, begin processing and paying nominations and applications as they come in

Alberta

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AIT Scholarships

- AIT Scholarships in UAT
  - Alberta Youth in Apprenticeship and Alberta Youth in Apprenticeship Bright Futures
    - Changing Business Processes
  - Production Aug 8

- Minister Priorities Impacts
  - 19.1 Release

ERP Impact on Transferring Programs

- Potential impacts on scholarship financial processes
  - Transferring funds to other GOA departments

- PFS met with Treasury Board

- Additional Investigation Required
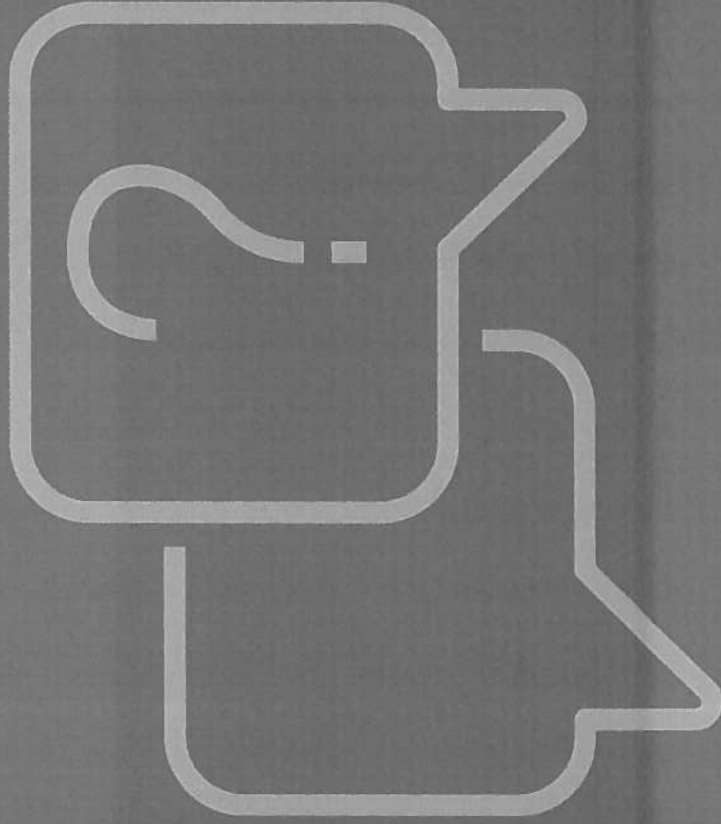
Alberta

18

Questions?

Hey Maggie;

Here's the high level stuff for the BN for Ray Gilmour. You'll need to confirm my dates and such. I have a call with Steven Bull tomorrow morning and will let him know we're working on this. I'll share a version with him at some point.

Andy Weiler
Assistant Deputy Minister
Apprenticeship and Student Aid
Government of Alberta
(O) 780-644-7732
(M) 780-719-9325

What happened:

Background

- Transformation of student aid programs/services has been underway since 2015(?)
- Replacing an aging IT system used to administer/pay approximately 40 scholarships and awards was necessary as the system was being decommissioned in Dec 2019
- The new IT system would also include the Rutherford Scholarship which was housed on a different Student Aid system than the other 40 scholarships on the aging legacy system
- Plan was to have new system in place at the end of July 2019 and all applications up on Aug 1
- Starting in April 2019, work on a new system slowed as AE business area and Service Alberta IMT worked through a series of issues around outcomes and deliverables of new system
- In May/June/July IMT resources were impacted by contracts not being renewed or resources were diverted from this project to other government priorities (eg ERP)
- Service Alberta implemented a mitigation strategy that pulled IT resources from other areas but this required these resources to be brought up to speed on the project
- Decision was made in June (?) through discussions between AE and Service Alberta that the launch date of end July could not be met and would have to be pushed out several months
- Plan was developed to not post any scholarship applications on August 1 including Rutherford and communicate publicly that work was occurring on an IT system that would result in the delay of posting applications
- An operational communications plan was developed by AE Communications Branch and signed off by the DM on July 30
- Copies of the communications material were shared with the MO on the morning of July 30
- Information was posted on the web and provided to institutions, high schools, other organizations and GoA departments about the delay in posting applications and the reason (development of new IT system)
- Over the course of July 30-Aug 2, a number of conversations occurred between the department and minister's office
- On Aug 2, the minister's office asked that the Rutherford Scholarship be posted in early afternoon and a number of other publicly accessible scholarship applications be posted by EOD
- [redacted]   24 (1) (a)
- Following media coverage on August 4 about the Rutherford Scholarship not being posted, the department was told to make the Rutherford Scholarship available at 3:00
- The other scholarships remain delayed as the development of the new IT system continues

Mitigation

- DM will be raising more operational matters with MO for awareness
- Internal processes and timelines within the Apprenticeship and Student Aid branch and the Communications Branch will be reviewed and revised to ensure public information is provided earlier for DM sign off
- Department will continue to work closely with Service Alberta to ensure timelines for the project are maintained

I bolded a few items from a visual perspective. I think we may be missing a few facts between February 2019 and May 2019. I will follow up in the morning.
Stacey

From: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Sent: August 8, 2019 5:20 PM
To: Aneta Rans <Aneta.Rans@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Steve Sands <Steve.Sands@gov.ab.ca>; Lisa LHirondelle <lisa.lhirondelle@gov.ab.ca>; Mallory Nault <Mallory.Nault@gov.ab.ca>; Sarah Mcfatridge <Sarah.Mcfatridge@gov.ab.ca>; Mira Quintin <Mira.Quintin@gov.ab.ca>
Subject: RE: Scholarship Project Timelines

Great work everyone!! THANK YOU

Attached are the documents with my changes incorporated. I will be sending to Andy shortly with a caveat that it's pending a final review from Stacey

Maggie

Maggie DesLauriers
Executive Director, Student Aid
Alberta Advanced Education
P: 780.422.4498
C: 780.717.9250
www.studentaid.alberta.ca

Alberta ■ *Student Aid*

From: Aneta Rans <Aneta.Rans@gov.ab.ca>
Sent: August 8, 2019 4:15 PM
To: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>; Leo Amaral <Leo.Amaral@gov.ab.ca>; Steve Sands <Steve.Sands@gov.ab.ca>
Subject: Fwd: Scholarship Project Timelines

Just resending to loop everyone.

Sent from my iPhone

Begin forwarded message:

Maggie/Stacey,

Please find enclosed the project timeline for your review. One document is with
attachments and one is without.

Thanks,

Aneta Rans
Manager, Scholarship Delivery and Transformation
Alberta Scholarships and Awards
Alberta Student Aid, Advanced Education
(780) 427 – 7859
www.studentaid.alberta.ca

Alberta ■ Student Aid

Scholarship Transformation Project		
Timeline	Item	Description
November 2015	Scholarship Business Transformation Project Terms of Reference Approved	The Scholarship Business Transformation Project launched. TOR defines purpose of project from a business perspective. Project purpose was to identify short term and long-term opportunities to transform the design and delivery of scholarship programming administered by Student Aid in order to improve client services and operate more efficiently. SA began defining the current state of scholarship programming.
December 2015 – February 2016	Scholarships and Awards Current State Review and Moratorium Conversations	Based on current state analysis recommendations were put forward to place certain programs on moratorium in order to give business time to review programs and their intent. Approval was not provided.
February 2016 – October 2016	Continued with completing current state analysis and program and policy reviews.	Program and policy review findings were summarized and shared with senior management.
November 2016	Student Surveys, Cross Jurisdictional Scans	SA conducted several student surveys around scholarship programming regarding gaps in funding and student needs. As well as a comparison with other jurisdictions across the country on the number of scholarships available.
January 2017 – May 24, 2017	Stakeholder Engagement	As part of the Tuition and System Resourcing review approved by Cabinet in September 2016, Advanced Education conducted a stakeholder engagement to consider how student aid programming can support the adult learning principles of accessibility and affordability. Staff met with various stakeholders, including: Alberta Students' Executive Council (ASEC), Council of Alberta University Students (CAUS), the Alberta Graduate Provincial Advisory Council (ab-GPAC); Deans of Graduate Studies, and various government departments that partner with SA in scholarship delivery.
March 2017	IMT Decision Request - Maintaining scholarship processing on the Legacy Students Finance System (SFS)	IMT prepared a decision request highlighting the legacy hardware becoming unsupported by December 2019. At that time, there were no alternatives, but to accept the risks associated with Legacy SFS remaining on the existing infrastructure for the 2017/18 fiscal year to enable scholarship processing to continue until business is ready to kick off an IT project.
July 2017 – Sept 2017	Policy Recommendation Development and Submission	Approval requested on a multi-pronged strategy to enhance access and affordability of post-secondary education by repurposing governments investments in education-related tax credits into programs that are more effective. Some scholarships and awards were identified for repurposing in order to enhance access and affordability of post-secondary education.
September 2017	Scholarships go-forward strategy report	IMT and Student Aid collaborated on a Scholarships go-forward strategy report. The recommendation was to build an in-house solution that would reuse, leverage or extend the existing scholarships solution.
September 2017 – February 2018	Policy Decisions Delayed, no direction provided to move forward	During this time IMT was in a position to begin the system development to ensure system availability, however business area was awaiting government's decision regarding the program changes proposed to

Commented [AW1]: Should include if it was approved or not. Or does that come later?

1

		Scholarship Transformation Project	

Timeline	Item	Description
		ensure that the system developed will only support programs that are approved to continue.
February 2018	BN requesting to move forward with only Operational Improvements to Scholarship Programming	Approval provided to move forward with operational improvements since broader policy recommendations specific to scholarships and awards were not approved.
February 2018	IMT Scholarship Business Case Approval	Approval was provided to begin system work on the first part of the scholarship project. The Scholarship project consists of 5 parts: 1) Scholarships Core Foundation 2) Online self service 3) Confirmation of registration, Scholarship Dashboard and Enhanced reporting 4) Third Party Access 5) Scholarships key policy changes and enhancements
February 2018	IT Project Initiated and Project Charter development	Project kicked off and Phase 1 Project Charter submitted for review and approval. • Phase 1 – Scholarship Core Foundation Project target completion March 2019.
March 2018	IMT and Business Project Kick off	Team meetings and working group sessions began to understand business requirements.
March 2018 – April 2018	Finalized Business project charter for Scholarships Transformation Part 1	The goal of the project is to create improvements that advance a future state vision of providing complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.
March 2018 – November 2018	Finalized IT Project Charter for Scholarships Transformation Part 1.	Divergence from original scope outlined in the business case and project charter. The scope was negotiated with the business and due to business transformation running in parallel to the IT project it contributed to a delay in scope and requirements finalization.
June 2018 – September 2018	Stakeholder Engagement regarding operational improvements to programs	Student Aid conducted a stakeholder engagement with all impacted stakeholders including post-secondary institutions, donors, athletic organizations, high schools, and government departments. Engagement focused on improving the delivery of scholarship programming by aligning, amalgamating, or changing the delivery model of a scholarship in order to streamline administration and provide better service to students, stakeholders, and government staff.
October 2018	Created the Graduate Scholarships Working Group	The working group was established to assess programs that can be amalgamated at the graduate level and design a new Graduate program with eligibility criteria that supported stakeholder engagement feedback.

Commented [AW2]: Is this the time period we were working on the Cabinet Report? If so, maybe we say - "business area was awaiting direction from government on potential changes to student aid programming".

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Commented [AW3]: If either of these two "approvals" in February are related the BN that the DM signed off, the BN was signed off in March so should be reflected in the timeline.

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Scholarship Transformation Project		
Timeline	Item	Description
		The Alberta Graduate Excellence Scholarship was created and it amalgamated 7 programs that were all administered differently in the past.
November 2018	Decision Request 001 Conformation of Registration (COR) for Scholarships Approved	A decision was required to leverage full-time confirmation of registration for students enrolled in full-time study for all other programs but Rutherford in the new system solution. In 2016, Rutherford began leveraging full time confirmation of registration. Approval was provided.
	Decision Request 002 Scholarship Schedule Adjustment Approval	Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons. The team proposed splitting Part 1 of project into 2 releases. Release 1 – Go live July 26, 2019 Release 2 – Go live November 2019 SA senior leadership approved the option and requested team moves forward with a Change Request.
February 2019	Decision Request 003 Rutherford Application Availability Change Approval	Business requested Rutherford application availability be changed from June to August 1 to align with Scholarship annual application cycles and detach processes from loans and grants. Approval to align was provided.
	Decision Request 004 Alberta Graduate Excellence Scholarship (AGES) Approval	Approval to proceed with the new Alberta Graduate Excellence Scholarship was provided from SA senior leadership. Once budget approvals would be provided the program would proceed with implementation with the institutions. A decision was required on which method of delivery to leverage for the Jason Lang scholarship in the new system solution and clean-up the eligibility criteria. Approval was provided to leverage the new uploader solution in the system and program administration change to the institutions.
	Decision Request 005 Jason Lang Delivery Approval	
February 2019	IMT Project Change Request # 1	The two major milestones affected by this Change Request are as follows: • The new deployment target date is July 25, 2019. • Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019.
May 2019	IMT Contingent Labour Procurement Changes	As of May 17, 2019, a new process regarding contracts and grants approval was implemented. All contracts and grants require approval by a committee of Deputy Ministers.

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		Scholarship Transformation Project	
Timeline	**Item**	**Description**	
		A number of scholarships technical resources may be impacted by the GoA contract approval processes and will be assessed as necessary.	**Commented [AW4]:** Tense? "were"
June 2019	IMT Project Change Request # 2	The three major milestones affected by this Change Request are as follows: • New target date is October 24, 2019. • Alexander Rutherford Scholarship will not be removed from the Students Finance System (SFS) and migrated to the new scholarships solution.	**Commented [AW5]:** Only two listed.

July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
		  • Release 2 includes remaining functionality and planned for late 2019.	

October 2019	IT System Go Live Date	Planned go live date – October 24th 2019	

Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions	
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager	**Commented [AW6]:** IN the email you forwarded on Wednesday there was a UAT coordinator Sriram Vancheeswaran that was rejected then was approved for "ERP submission". Is that person on this list? I read that as the resources was approved but moved to the ERP project.
Project Manager	Resource resigned June 2019	CGI resource started July 2019	
Business Analyst	Contract expired June 2019	No replacement required – business requirements complete	
Developer	Contract expired June 2019	Resource started in June 2019	
Developer	Contract expired July 2019	CGI resource started August 2019	

4

Project Roles	Resource change reason	Mitigation Decisions
Developer	New role added	CGI resource started August 2019
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
Tester (Performance)	New role added	Resource started July 2019

Impacts of resourcing changes include but are not limited to:

- Loss of corporate knowledge
- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business

5

Risk	Mitigation
	process and scholarship transformation activities that affect the technical solution.
Project success is dependant on a technical team with Student Finance System (SFS) experience and business team with detailed scholarships knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

6

Scholarship Transformation Project		
Timeline	**Item**	**Description**
November 2015	Scholarship Business Transformation Project Terms of Reference Approved	The Scholarship Business Transformation Project launched. TOR defines purpose of project from a business perspective. Project purpose was to identify short term and long-term opportunities to transform the design and delivery of scholarship programming administered by Student Aid in order to improve client services and operate more efficiently. SA began defining the current state of scholarship programming.
December 2015 – February 2016	Scholarships and Awards Current State Review and Moratorium Conversations	Based on current state analysis recommendations were put forward to place certain programs on moratorium in order to give business time to review programs and their intent. **Deputy Minister (DM) approval not provided.**
February 2016 – October 2016	Continued with completing current state analysis and program and policy reviews.	Program and policy review findings were summarized and shared with senior management.
November 2016	Student Surveys, Cross Jurisdictional Scans	SA conducted several student surveys around scholarship programming regarding gaps in funding and student needs. As well as a comparison with other jurisdictions across the country on the number of scholarships available.
January 2017 – May 24, 2017	Stakeholder Engagement	As part of the Tuition and System Resourcing review approved by Cabinet in September 2016, Advanced Education conducted a stakeholder engagement to consider how student aid programming can support the adult learning principles of accessibility and affordability. Staff met with various stakeholders, including: Alberta Students' Executive Council (ASEC), Council of Alberta University Students (CAUS), the Alberta Graduate Provincial Advisory Council (ab-GPAC); Deans of Graduate Studies, and various government departments that partner with SA in scholarship delivery.
March 2017	IMT Decision Request - Maintaining scholarship processing on the Legacy Students Finance System (SFS)	IMT prepared a decision request highlighting the legacy hardware becoming unsupported by December 2019. At that time, there were no alternatives, but to accept the risks associated with Legacy SFS remaining on the existing infrastructure for the 2017/18 fiscal year to enable scholarship processing to continue until business is ready to kick off an IT project. **Executive Director (ED) approval provided.**
September 2017	Scholarships go-forward strategy report	IMT and Student Aid collaborated on a Scholarships go-forward strategy report. The recommendation was to build an in-house solution that would reuse, leverage or extend the existing scholarships solution.
September 2017 – February 2018	Policy Decisions Delayed, no direction provided to move forward	During this time, IMT was in a position to begin the system development to ensure system availability, however business area was awaiting direction from government on potential changes to student aid programming.
February 2018	BN requesting to move forward with only Operational Improvements to Scholarship Programming	SA requested approval to move forward with operational improvements since broader policy recommendations specific to scholarships and awards were not approved.

1

Scholarship Transformation Project		
Timeline	**Item**	**Description**
March 2018	BN Operational Improvements to Scholarship Programming Approval	**DM approval provided** to move forward with Operational Improvements to Scholarship Programming.
February 2018	IMT Scholarship Business Case Approval	**ED approval provided** to begin system work on the first part of the scholarship project. The Scholarship project consists of 5 parts: 1) Scholarships Core Foundation 2) Online self service 3) Confirmation of registration, Scholarship Dashboard and Enhanced reporting 4) Third Party Access 5) Scholarships key policy changes and enhancements
February 2018	IT Project Initiated and Project Charter development	Project kicked off and Phase 1 Project Charter submitted for review and approval. • Phase 1 – Scholarship Core Foundation Project target completion March 2019.
March 2018	IMT and Business Project Kick off	Team meetings and working group sessions began to understand business requirements.
March 2018 – April 2018	Finalized Business project charter for Scholarships Transformation Part 1	The goal of the project is to create improvements that advance a future state vision of providing complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.
March 2018 – November 2018	Finalized IT Project Charter for Scholarships Transformation Part 1.	Divergence from original scope outlined in the business case and project charter. The scope was negotiated with the business and due to business transformation running in parallel to the IT project it contributed to a delay in scope and requirements finalization.
June 2018 – September 2018	Stakeholder Engagement regarding operational improvements to programs	Student Aid conducted a stakeholder engagement with all impacted stakeholders including post-secondary institutions, donors, athletic organizations, high schools, and government departments. Engagement focused on improving the delivery of scholarship programming by aligning, amalgamating, or changing the delivery model of a scholarship in order to streamline administration and provide better service to students, stakeholders, and government staff.
October 2018	Created the Graduate Scholarships Working Group	The working group was established to assess programs that can be amalgamated at the graduate level and design a new Graduate program with eligibility criteria that supported stakeholder engagement feedback. The Alberta Graduate Excellence Scholarship was created and it amalgamated 7 programs that were all administered differently in the past.

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Scholarship Transformation Project			
Timeline	Item		Description
November 2018	Created the Scholarship Project Steering Committee		**The Steering Committee is the decision-making governance body for the project.** Membership consisted of Student Aid project team members as well as IMT project team members to ensure a shared understanding of the scholarship business transformation.
November 2018	Decision Request 001 Conformation of Registration (COR) for Scholarships Approved		A decision was required to leverage full-time confirmation of registration for students enrolled in full-time study for all other programs but Rutherford in the new system solution. In 2016, Rutherford began leveraging full time confirmation of registration. **Steering Committee approval provided.**
	Decision Request 002 Scholarship Schedule Adjustment Approval		Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons. The team proposed splitting Part 1 of project into 2 releases. Release 1 – Go live July 26, 2019 Release 2 – Go live November 2019 Scholarship Project **Steering Committee approved the option and requested team moves forward with a Change Request.**
February 2019	Decision Request 003 Rutherford Application Availability Change Approval		Business requested Rutherford application availability be changed from June to August 1 to align with Scholarship annual application cycles and detach processes from loans and grants. **Steering Committee approval provided.**
	Decision Request 004 Alberta Graduate Excellence Scholarship (AGES) Approval		Scholarship Project **Steering Committee provided approval** to proceed with the new Alberta Graduate Excellence Scholarship. Once budget approvals are provided the program would proceed with implementation with the institutions.
	Decision Request 005 Jason Lang Delivery Approval		A decision was required on which method of delivery to leverage for the Jason Lang scholarship in the new system solution and clean-up the eligibility criteria. Scholarship Project **Steering Committee provided approval** to leverage the new uploader solution in the system and program administration change to the institutions.
February 2019	IMT Project Change Request # 1		The two major milestones affected by this Change Request are as follows: • The new deployment target date is July 25, 2019. • Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019.
April 2019	Scholarship Steering Committee Meeting: Organizational / Program Transformation & IMT Perspectives		A Scholarship Steering Committee working group was facilitated by Student Aid and IMT to assist all participants in understanding the existing challenges and gaps between Student Aid and IMT as it relates

3

Scholarship Transformation Project		
Timeline	**Item**	**Description**

		to the Scholarship Transformation Project. The conversation focused on understanding the divergence in expectations and approach when it comes to transformation activities and system development and to reach a shared understanding for the approach going forward.
		
		The following next steps were identified:
		- Finalize production release (July 25th) and proceed with Scholarships Part 1 release 1
		- Provide a demo of the current developed scholarship product to all key stakeholders
		- Identify and engage the right people from IMT and Student Aid in the development of options for Part 1, Release 2 (Rutherford scope)
		- Hold a Steering Committee working group #2 in May focusing on reviewing the IMT and Business Project Charters to:
		    o Understand where Student Aid and IMT were not on the same page with respect to expectations for scholarships transformation and approach towards system development to meet transformation objectives
		    o Understand what contributed to that divergence in understanding, and
		    o Agree on the primary focus and objectives of scholarships transformation going forward and approach needed by the team to meet those objectives and understand all options available
		
		The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

May 2019	Scholarship Steering Committee Meeting #2: Organizational / Program Transformation & IMT Perspectives	A continuation of conversation from the April Steering Committee working group. Conversations focused on a deeper dive into the diverging expectations from both IMT and Business and future direction of the Scholarship Transformation project. Steering Committee made the decision to postpone future phases of the Scholarship project in order to ensure successful delivery of phase 1. The challenges highlighted above resulted in an impact on project scope, cost, and schedule.
May 2019	IMT Contingent Labour Procurement Changes	As of May 17, 2019, a new process regarding contracts and grants approval was implemented. All contracts and grants require approval by a committee of Deputy Ministers. Two resources (Program Manager and UAT Coordinator) have been impacted in May. **A number of scholarships technical resources were impacted by the GoA contract approval processes** and will be assessed as necessary.

4

Scholarship Transformation Project		
Timeline	**Item**	**Description**
June 2019	IMT Project Change Request # 2	The two major milestones affected by this Change Request are as follows: • New target date is October 24, 2019. • Alexander Rutherford Scholarship will not be removed from the Students Finance System (SFS) and migrated to the new scholarships solution.

July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
		  • Release 2 includes remaining functionality and planned for late 2019.

October 2019	IT System Go Live Date	Planned go live date – October 24th 2019

Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager
Project Manager	Resource resigned June 2019	CGI resource started July 2019
Business Analyst	Contract expired June 2019	No replacement required – business requirements complete
Developer	Contract expired June 2019	Resource started in June 2019
Developer	Contract expired July 2019	CGI resource started August 2019
Developer	New role added	CGI resource started August 2019

Project Roles	Resource change reason	Mitigation Decisions
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
Tester (Performance)	New role added	Resource started July 2019

Impacts of resourcing changes include but are not limited to:

- Loss of corporate knowledge
- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business process and scholarship transformation activities that affect the technical solution.

6

Risk	Mitigation
Project success is dependant on a technical team with Student Finance System (SFS) experience and business team with detailed scholarships knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

7

Before I send this through ARTs, take a look at this BN and what I'm deleting. Need to make sure I'm not taking stuff out that should be left in.

ADVICE TO DEPUTY MINISTER

ALEXANDER RUTHERFORD SCHOLARSHIP DELAY

PURPOSE
To provide an overview of Advanced Education's (AEs) Alexander Rutherford Scholarship delay that occurred in August 2019.

BACKGROUND
- The development of programs over several decades has resulted in a complex suite scholarships and awards delivered by the Government of Alberta (more than 10 times that of any other province/territory) with significant variances in amounts, application cycles, eligibility criteria, requirements, and delivery methods.
    - This is a significant administrative burden for students, post-secondary institutions, and government, with many manual processes needed to respond to program variety and diversity.
- Beginning in 2015, Advanced Education conducted a comprehensive review of all scholarships and awards programs.
- The review resulted in the establishment of the Scholarships Business Transformation Project with the purpose of identifying and implementing administrative improvements to enhance client service, increase efficiency, strengthen accountability, and support development of a future state vision.
    - Institutions and students confirmed support for the department's objectives to improve programming through surveys and engagement meetings.
- Part of the project included replacing the existing aging IT system used to administer/pay approximately 36 scholarships and awards.
    - This was necessary as the system was being decommissioned in December 2019
- The new system will replace the existing system, resulting in streamlined processes, and automated functions that are currently performed manually.
    - New system development began March 2018.
- Rutherford scholarships are currently housed on a different Alberta Student Aid system than the other 36 scholarships on the aging legacy system
    - Rutherford is AEs largest scholarship with approximately 19,000 recipients and $41 million in funding awarded in 2018/2019 fiscal year.
- The original plan was to have the new system in place at the end of July 2019 and all scholarship and award applications up on Aug 1, 2019.
    - In 2018, as part of the Scholarship Transformation Project, Student Aid consulted with stakeholders to align the business cycles of all scholarship and award programs.
    - Based on that engagement, cycles were adjusted and stakeholders were informed that all applications will be available August 1.

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- In February 2019, the scope to include Rutherford scholarships within the new system was approved with a target implementation date of November 2019.
- Starting in April 2019, work on a new system slowed as AE business area and Service Alberta IMT worked through a series of issues around outcomes and deliverables of the new system.
- In April and May 2019, senior leadership from Alberta Student Aid and Service Alberta IMT met to develop a go forward approach.
  - Rutherford scholarships was removed from scope in the development of the new system.
- In May, June, and July 2019 IMT resources were impacted by contracts not being renewed
  - Service Alberta has since implemented a mitigation strategy that pulled IT resources from other areas and the existing Student Aid vendor contract (CGI).
  - Onboarding and transition activities consumed capacity of other project team members to continue development at the same rate.
- In June a decision was made collectively by AE and Service Alberta that the end of July launch date could not be met and would have to be pushed out by several months.
- An implementation plan was developed to not post any scholarship applications on August 1, including Rutherford, and communicate publicly that work was occurring on an IT system that would result in the delay of posting applications.

24 (1) (a)

- An operational communications plan was developed with AE Communications Branch and signed off by the DM on July 30.
  - Copies of the communications material were shared with minister's office (MO) on the morning of July 30.
- Information was posted on the web and provided to post-secondary institutions, high schools, scholarship and award donors, other organizations and Government of Alberta departments about the delay in posting applications and the reason (development of new system).
- ~~In additional to delays in the new system development, Student Aid continues to work on major transformation and redesign for Alberta Scholarships and Awards.~~
- The system to process and pay scholarship and award recipients will not be completed until late fall.
  - The new system is scheduled to go live ~~end of~~later in October 2019.
- Over the course of July 30 to August 2, 2019, a number of conversations occurred between the department and MO.

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- On August 2, the minister's office asked that Rutherford be posted in early afternoon and a number of other publicly accessible scholarship applications be posted by end of day.
-

24 (1) (a)

- Following media coverage on August 4 about Rutherford not being available, the department was directed to make Rutherford available at 3:00 pm.

ANALYSIS

- The issues realized through development of the new system were previously identified as potential risks in project documentation.
  - Mitigation strategies were put in place, however risks were not able to be fully mitigated for a number of reasons including project complexity, implementation of business process changes in tandem with system development, and availability of resources.
- Other scholarships and awards remain delayed as the development of the new system continues.
- Without the new system, manual processes will be required to administer the scholarship and award programs, causing a higher risk of human error, delays in processing payments to recipients, and increased inquiries from students and other stakeholders.
- Program staff have already altered business processes in partnership with the delivery partners (other government departments and institutions) to align with the new system. Delivery partners are prepared to deliver with the new processes.
- Scholarship and award program funding for 2019/2020 is not yet confirmed.

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MOVING FORWARD

- DM will be raising more operational matters with Ministers Office for awareness and has prepared a summary of scholarship related timelines for the Minister (attachment 1).

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- Internal processes and timelines within the Apprenticeship and Student Aid division, Service Alberta Workforce Development sector and the Communications branch will be reviewed and revised to ensure public information is provided earlier for DM sign off.
- AE will continue to work closely with Service Alberta to ensure timelines for the project are maintained.

ATTACHMENT: Scholarship Transformation Project Timeline

CONTACT: Andy Weiler, Assistant Deputy Minister
Apprenticeship and Student Aid, 780-644-7732

Scholarship Transformation Project		
Timeline	Item	Description
November 2015	Scholarship Business Transformation Project Terms of Reference Approved	The Scholarship Business Transformation Project launched. TOR defines purpose of project from a business perspective. Project purpose was to identify short term and long-term opportunities to transform the design and delivery of scholarship programming administered by Student Aid in order to improve client services and operate more efficiently. SA began defining the current state of scholarship programming.
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Scholarship Transformation Project			
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February 2018	IT Project Initiated and Project Charter development		Project kicked off and Phase 1 Project Charter submitted for review and approval. • Phase 1 – Scholarship Core Foundation Project target completion March 2019.
March 2018	IMT and Business Project Kick off		Team meetings and working group sessions began to understand business requirements.
March 2018 – April 2018	Finalized Business project charter for Scholarships Transformation Part 1		The goal of the project is to create improvements that advance a future state vision of providing complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.
March 2018 – November 2018	Finalized IT Project Charter for Scholarships Transformation Part 1.		Divergence from original scope outlined in the business case and project charter. The scope was negotiated with the business and due to business transformation running in parallel to the IT project it contributed to a delay in scope and requirements finalization.
June 2018 – September 2018	Stakeholder Engagement regarding operational improvements to programs		Student Aid conducted a stakeholder engagement with all impacted stakeholders including post-secondary institutions, donors, athletic organizations, high schools, and government departments. Engagement focused on improving the delivery of scholarship programming by aligning, amalgamating, or changing the delivery model of a scholarship in order to streamline administration and provide better service to students, stakeholders, and government staff.
October 2018	Created the Graduate Scholarships Working Group		The working group was established to assess programs that can be amalgamated at the graduate level and design a new Graduate program with eligibility criteria that supported stakeholder engagement feedback. The Alberta Graduate Excellence Scholarship was created and it amalgamated 7 programs that were all administered differently in the past.

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Scholarship Transformation Project		
Timeline	**Item**	**Description**
November 2018	Created the Scholarship Project Steering Committee	**The Steering Committee is the decision-making governance body for the project**. Membership consisted of Student Aid project team members as well as IMT project team members to ensure a shared understanding of the scholarship business transformation.
November 2018	Decision Request 001 Conformation of Registration (COR) for Scholarships Approved	A decision was required to leverage full-time confirmation of registration for students enrolled in full-time study for all other programs but Rutherford in the new system solution. In 2016, Rutherford began leveraging full time confirmation of registration. **Steering Committee approval provided.**
	Decision Request 002 Scholarship Schedule Adjustment Approval	Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons.

The team proposed splitting Part 1 of project into 2 releases.

Release 1 – Go live July 26, 2019
Release 2 – Go live November 2019

Scholarship Project **Steering Committee approved the option and requested team moves forward with a Change Request**. |
| February 2019 | Decision Request 003 Rutherford Application Availability Change Approval | Business requested Rutherford application availability be changed from June to August 1 to align with Scholarship annual application cycles and detach processes from loans and grants. **Steering Committee approval provided.** |
| | Decision Request 004 Alberta Graduate Excellence Scholarship (AGES) Approval | Scholarship Project **Steering Committee provided approval** to proceed with the new Alberta Graduate Excellence Scholarship. Once budget approvals are provided the program would proceed with implementation with the institutions. |
| | Decision Request 005 Jason Lang Delivery Approval | A decision was required on which method of delivery to leverage for the Jason Lang scholarship in the new system solution and clean-up the eligibility criteria.

Scholarship Project **Steering Committee provided approval** to leverage the new uploader solution in the system and program administration change to the institutions. |
| February 2019 | IMT Project Change Request # 1 | The two major milestones affected by this Change Request are as follows:
- The new deployment target date is July 25, 2019.
- Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019. |
| April 2019 | Scholarship Steering Committee Meeting: Organizational / Program Transformation & IMT Perspectives | A Scholarship Steering Committee working group was facilitated by Student Aid and IMT to assist all participants in understanding the existing challenges and gaps between Student Aid and IMT as it relates |

3

	Scholarship Transformation Project	
Timeline	**Item**	**Description**

		to the Scholarship Transformation Project. The conversation focused on understanding the divergence in expectations and approach when it comes to transformation activities and system development and to reach a shared understanding for the approach going forward.
		
		The following next steps were identified:
		- Finalize production release (July 25th) and proceed with Scholarships Part 1 release 1
		- Provide a demo of the current developed scholarship product to all key stakeholders
		- Identify and engage the right people from IMT and Student Aid in the development of options for Part 1, Release 2 (Rutherford scope)
		- Hold a Steering Committee working group #2 in May focusing on reviewing the IMT and Business Project Charters to:
		   o Understand where Student Aid and IMT were not on the same page with respect to expectations for scholarships transformation and approach towards system development to meet transformation objectives
		   o Understand what contributed to that divergence in understanding, and
		   o Agree on the primary focus and objectives of scholarships transformation going forward and approach needed by the team to meet those objectives and understand all options available
		
		The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

May 2019	Scholarship Steering Committee Meeting #2: Organizational / Program Transformation & IMT Perspectives	A continuation of conversation from the April Steering Committee working group. Conversations focused on a deeper dive into the diverging expectations from both IMT and Business and future direction of the Scholarship Transformation project. Steering Committee made the decision to postpone future phases of the Scholarship project in order to ensure successful delivery of phase 1. The challenges highlighted above resulted in an impact on project scope, cost, and schedule.
May 2019	IMT Contingent Labour Procurement Changes	As of May 17, 2019, a new process regarding contracts and grants approval was implemented. All contracts and grants require approval by a committee of Deputy Ministers. Two resources (Program Manager and UAT Coordinator) have been impacted in May. **A number of scholarships technical resources were impacted by the GoA contract approval processes** and will be assessed as necessary.

Scholarship Transformation Project		
Timeline	Item	Description
June 2019	IMT Project Change Request # 2	The two major milestones affected by this Change Request are as follows: • New target date is October 24, 2019. • Alexander Rutherford Scholarship will not be removed from the Students Finance System (SFS) and migrated to the new scholarships solution.

July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
		  • Release 2 includes remaining functionality and planned for late 2019.

October 2019	IT System Go Live Date	Planned go live date – October 24th 2019

Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager
Project Manager	Resource resigned June 2019	CGI resource started July 2019
Business Analyst	Contract expired June 2019	No replacement required – business requirements complete
Developer	Contract expired June 2019	Resource started in June 2019
Developer	Contract expired July 2019	CGI resource started August 2019
Developer	New role added	CGI resource started August 2019

5

Project Roles	Resource change reason	Mitigation Decisions
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
Tester (Performance)	New role added	Resource started July 2019

Impacts of resourcing changes include but are not limited to:

- Loss of corporate knowledge
- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business process and scholarship transformation activities that affect the technical solution.

6

Risk	Mitigation
Project success is dependant on a technical team with Student Finance System (SFS) experience and business team with detailed scholarships knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

7

Here's the detailed timeline Minister asked for by Tuesday. There's a highlighted section that I think we can remove but would like your take. We have another version of this document that includes supporting documents for various milestones. We can include this document with Ray's BN.

Scholarship Transformation Project		
Timeline	**Item**	**Description**
November 2015	Scholarship Business Transformation Project Terms of Reference Approved	The Scholarship Business Transformation Project launched. TOR defines purpose of project from a business perspective. Project purpose was to identify short term and long-term opportunities to transform the design and delivery of scholarship programming administered by Student Aid in order to improve client services and operate more efficiently. SA began defining the current state of scholarship programming.
December 2015 – February 2016	Scholarships and Awards Current State Review and Moratorium Conversations	Based on current state analysis recommendations were put forward to place certain programs on moratorium in order to give business time to review programs and their intent. **Deputy Minister (DM) approval not provided.**
February 2016 – October 2016	Continued with completing current state analysis and program and policy reviews.	Program and policy review findings were summarized and shared with senior management.
November 2016	Student Surveys, Cross Jurisdictional Scans	SA conducted several student surveys around scholarship programming regarding gaps in funding and student needs. As well as a comparison with other jurisdictions across the country on the number of scholarships available.
January 2017 – May 24, 2017	Stakeholder Engagement	As part of the Tuition and System Resourcing review approved by Cabinet in September 2016, Advanced Education conducted a stakeholder engagement to consider how student aid programming can support the adult learning principles of accessibility and affordability. Staff met with various stakeholders, including: Alberta Students' Executive Council (ASEC), Council of Alberta University Students (CAUS), the Alberta Graduate Provincial Advisory Council (ab-GPAC); Deans of Graduate Studies, and various government departments that partner with SA in scholarship delivery.
March 2017	IMT Decision Request - Maintaining scholarship processing on the Legacy Students Finance System (SFS)	IMT prepared a decision request highlighting the legacy hardware becoming unsupported by December 2019. At that time, there were no alternatives, but to accept the risks associated with Legacy SFS remaining on the existing infrastructure for the 2017/18 fiscal year to enable scholarship processing to continue until business is ready to kick off an IT project. **Executive Director (ED) approval provided.**
July 2017 – Sept 2017	Policy Recommendation Development and Submission	Approval requested on a multi-pronged strategy to enhance access and affordability of post-secondary education by repurposing governments' investments in education-related tax credits into programs that are more effective. Some scholarships and awards were identified for repurposing in order to enhance access and affordability of post-secondary education. **Minister approval not provided.**
September 2017	Scholarships go-forward strategy report	IMT and Student Aid collaborated on a Scholarships go-forward strategy report. The recommendation was to build an in-house solution that would reuse, leverage or extend the existing scholarships solution.

1

Scholarship Transformation Project		
Timeline	**Item**	**Description**
September 2017 – February 2018	Policy Decisions Delayed, no direction provided to move forward	During this time, IMT was in a position to begin the system development to ensure system availability, however business area was awaiting direction from government on potential changes to student aid programming.
February 2018	BN requesting to move forward with only Operational Improvements to Scholarship Programming	SA requested approval to move forward with operational improvements since broader policy recommendations specific to scholarships and awards were not approved.
March 2018	BN Operational Improvements to Scholarship Programming Approval	**DM approval provided** to move forward with Operational Improvements to Scholarship Programming.
February 2018	IMT Scholarship Business Case Approval	**ED approval provided** to begin system work on the first part of the scholarship project. The Scholarship project consists of 5 parts: 1) Scholarships Core Foundation 2) Online self service 3) Confirmation of registration, Scholarship Dashboard and Enhanced reporting 4) Third Party Access 5) Scholarships key policy changes and enhancements
February 2018	IT Project Initiated and Project Charter development	Project kicked off and Phase 1 Project Charter submitted for review and approval. • Phase 1 – Scholarship Core Foundation Project target completion March 2019.
March 2018	IMT and Business Project Kick off	Team meetings and working group sessions began to understand business requirements.
March 2018 – April 2018	Finalized Business project charter for Scholarships Transformation Part 1	The goal of the project is to create improvements that advance a future state vision of providing complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.
March 2018 – November 2018	Finalized IT Project Charter for Scholarships Transformation Part 1.	Divergence from original scope outlined in the business case and project charter. The scope was negotiated with the business and due to business transformation running in parallel to the IT project it contributed to a delay in scope and requirements finalization.
June 2018 – September 2018	Stakeholder Engagement regarding operational improvements to programs	Student Aid conducted a stakeholder engagement with all impacted stakeholders including post-secondary institutions, donors, athletic organizations, high schools, and government departments. Engagement focused on improving the delivery of scholarship programming by aligning, amalgamating, or changing the delivery model of a scholarship in order to streamline administration and provide better service to students, stakeholders, and government staff.

Scholarship Transformation Project		
Timeline	**Item**	**Description**
October 2018	Created the Graduate Scholarships Working Group	The working group was established to assess programs that can be amalgamated at the graduate level and design a new Graduate program with eligibility criteria that supported stakeholder engagement feedback. The Alberta Graduate Excellence Scholarship was created and it amalgamated 7 programs that were all administered differently in the past.
November 2018	Created the Scholarship Project Steering Committee	**The Steering Committee is the decision-making governance body for the project**. Membership consisted of Student Aid project team members as well as IMT project team members to ensure a shared understanding of the scholarship business transformation.
November 2018	Decision Request 001 Conformation of Registration (COR) for Scholarships Approved	A decision was required to leverage full-time confirmation of registration for students enrolled in full-time study for all other programs but Rutherford in the new system solution. In 2016, Rutherford began leveraging full time confirmation of registration. **Steering Committee approval provided.**
	Decision Request 002 Scholarship Schedule Adjustment Approval	Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons. The team proposed splitting Part 1 of project into 2 releases. Release 1 – Go live July 26, 2019 Release 2 – Go live November 2019 Scholarship Project **Steering Committee approved the option and requested team moves forward with a Change Request.**
February 2019	Decision Request 003 Rutherford Application Availability Change Approval	Business requested Rutherford application availability be changed from June to August 1 to align with Scholarship annual application cycles and detach processes from loans and grants. **Steering Committee approval provided.**
	Decision Request 004 Alberta Graduate Excellence Scholarship (AGES) Approval	Scholarship Project **Steering Committee provided approval** to proceed with the new Alberta Graduate Excellence Scholarship. Once budget approvals are provided the program would proceed with implementation with the institutions.
	Decision Request 005 Jason Lang Delivery Approval	A decision was required on which method of delivery to leverage for the Jason Lang scholarship in the new system solution and clean-up the eligibility criteria. Scholarship Project **Steering Committee provided approval** to leverage the new uploader solution in the system and program administration change to the institutions.
February 2019	IMT Project Change Request # 1	The two major milestones affected by this Change Request are as follows:

3

Scholarship Transformation Project		
Timeline	**Item**	**Description**
		• The new deployment target date is July 25, 2019. • Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019.

April 2019	Scholarship Steering Committee Meeting: Organizational / Program Transformation & IMT Perspectives	A Scholarship Steering Committee working group was facilitated by Student Aid and IMT to assist all participants in understanding the existing challenges and gaps between Student Aid and IMT as it relates to the Scholarship Transformation Project. The conversation focused on understanding the divergence in expectations and approach when it comes to transformation activities and system development and to reach a shared understanding for the approach going forward.
		
		The following next steps were identified:
		- Finalize production release (July 25th) and proceed with Scholarships Part 1 release 1
		- Provide a demo of the current developed scholarship product to all key stakeholders
		- Identify and engage the right people from IMT and Student Aid in the development of options for Part 1, Release 2 (Rutherford scope)
		- Hold a Steering Committee working group #2 in May focusing on reviewing the IMT and Business Project Charters to:
		   o Understand where Student Aid and IMT were not on the same page with respect to expectations for scholarships transformation and approach towards system development to meet transformation objectives
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		The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

May 2019	Scholarship Steering Committee Meeting #2: Organizational / Program Transformation & IMT Perspectives	A continuation of conversation from the April Steering Committee working group. Conversations focused on a deeper dive into the diverging expectations from both IMT and Business and future direction of the Scholarship Transformation project. Steering Committee made the decision to postpone future phases of the Scholarship project in order to ensure successful delivery of phase 1. The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

4

Scholarship Transformation Project		
Timeline	**Item**	**Description**
May 2019	IMT Contingent Labour Procurement Changes	As of May 17, 2019, a new process regarding contracts and grants approval was implemented. All contracts and grants require approval by a committee of Deputy Ministers. Two resources (Program Manager and UAT Coordinator) have been impacted in May. **A number of scholarships technical resources were impacted by the GoA contract approval processes** and will be assessed as necessary.
June 2019	IMT Project Change Request # 2	The two major milestones affected by this Change Request are as follows: • New target date is October 24, 2019. • Alexander Rutherford Scholarship will not be removed from the Students Finance System (SFS) and migrated to the new scholarships solution.

July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
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Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager
Project Manager	Resource resigned June 2019	CGI resource started July 2019

5

Project Roles	Resource change reason	Mitigation Decisions
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Developer	Contract expired June 2019	Resource started in June 2019
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Developer	New role added	CGI resource started August 2019
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
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Impacts of resourcing changes include but are not limited to:

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- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.

6

Risk	Mitigation
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business process and scholarship transformation activities that affect the technical solution.
Project success is dependant on a technical team with Student Finance System (SFS) experience and business team with detailed scholarships knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

7

From:	Andy Weiler
To:	Gerald Kastendieck
Subject:	FW: Alexander Rutherford Scholarship Delay BN - AR 57048
Date:	Monday, August 12, 2019 3:43:00 PM
Importance:	High

As discussed, see the tweak below to the BN for Ray.

From: Maggie DesLauriers
Sent: Monday, August 12, 2019 3:02 PM
To: Andy Weiler
Subject: FW: Alexander Rutherford Scholarship Delay BN - AR 57048
Importance: High

FYI

From: Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Sent: August 12, 2019 2:51 PM
To: Ruth Tejada <Ruth.Tejada@gov.ab.ca>; Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Subject: RE: Alexander Rutherford Scholarship Delay BN - AR 57048
Importance: High

Any chance we can submit one minor change on this bullet... Stephen Bull would like to remove the July. Or can we change it to "In early summer, "...

- In May and June, ~~and July~~ 2019 IMT resources were impacted by contracts not being renewed.

  - Service Alberta has since implemented a mitigation strategy that pulled IT resources from other areas and the existing Student Aid vendor contract (CGI).

  - Onboarding and transition activities consumed capacity of other project team members to continue development at the same rate.

Stacey

From: Ruth Tejada <Ruth.Tejada@gov.ab.ca>
Sent: August 12, 2019 2:25 PM
To: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>; Stacey Reynhoudt <stacey.reynhoudt@gov.ab.ca>
Subject: Alexander Rutherford Scholarship Delay BN - AR 57048

Hi Maggie and Stacey,

Please see the attached final Briefing Note and attachment.

Thank you,

Ruth

ADVICE TO DEPUTY MINISTER

ALEXANDER RUTHERFORD SCHOLARSHIP DELAY

PURPOSE

To provide an overview of Advanced Education's (AEs) Alexander Rutherford Scholarship delay that occurred in August 2019.

BACKGROUND

- The development of programs over several decades has resulted in a complex suite scholarships and awards delivered by the Government of Alberta (more than 10 times that of any other province/territory) with significant variances in amounts, application cycles, eligibility criteria, requirements, and delivery methods.
  - This is a significant administrative burden for students, post-secondary institutions, and government, with many manual processes needed to respond to program variety and diversity.
- Beginning in 2015, Advanced Education conducted a comprehensive review of all scholarships and awards programs.
- The review resulted in the establishment of the Scholarships Business Transformation Project with the purpose of identifying and implementing administrative improvements to enhance client service, increase efficiency, strengthen accountability, and support development of a future state vision.
  - Institutions and students confirmed support for the department's objectives to improve programming through surveys and engagement meetings.
- Part of the project included replacing the existing aging IT system used to administer/pay approximately 36 scholarships and awards.
  - This was necessary as the system is being decommissioned in December 2019.
- The new system will replace the existing system, resulting in streamlined processes, and automated functions that are currently performed manually.
  - New system development began in March 2018.
- Rutherford scholarships are currently housed on a different Alberta Student Aid system than the other 36 scholarships on the aging legacy system.
  - Rutherford is AEs largest scholarship with approximately 19,000 recipients and $41 million in funding awarded in 2018/2019 fiscal year.
- The original plan was to have the new system in place at the end of July 2019 and all scholarship and award applications up on August 1, 2019.
  - In 2018, as part of the Scholarship Transformation Project, Student Aid consulted with stakeholders to align the business cycles of all scholarship and award programs.
  - Based on that engagement, cycles were adjusted and stakeholders were informed that all applications will be available August 1.
- In February 2019, the scope to include Rutherford scholarships within the new system was approved with a target implementation date of November 2019.

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- In April 2019, work on a new system slowed as AE business area and Service Alberta IMT worked through a series of issues around outcomes and deliverables of the new system.
- In April and May 2019, senior leadership from Alberta Student Aid and Service Alberta IMT met to develop a go forward approach.
  - Rutherford scholarships was removed from scope in the development of the new system.
- In May, June, and July 2019 IMT resources were impacted by contracts not being renewed.
  - Service Alberta has since implemented a mitigation strategy that pulled IT resources from other areas and the existing Student Aid vendor contract (CGI).
  - Onboarding and transition activities consumed capacity of other project team members to continue development at the same rate.
- In June a decision was made collectively by AE and Service Alberta that the end of July launch date could not be met and would have to be pushed out by several months.
- An implementation plan was developed to not post any scholarship applications on August 1, including Rutherford, and communicate publicly that work was occurring on an IT system that would result in the delay of posting applications.
  - 24 (1) (a)
- An operational communications plan was developed with AE Communications Branch and signed off by the DM on July 30.
  - Copies of the communications material were shared with Minister's office (MO) on the morning of July 30.
- Information was posted on the web and provided to post-secondary institutions, high schools, scholarship and award donors, other organizations and Government of Alberta departments about the delay in posting applications and the reason (development of new system).
- In additional to delays in the new system development, Student Aid continues to work on major transformation and redesign for Alberta Scholarships and Awards.
- The system to process and pay scholarship and award recipients will not be completed until late fall.
  - The new system is scheduled to go live end of October 2019.
- Over the course of July 30 to August 2, 2019, a number of conversations occurred between the department and MO.
- On August 1, the Minister's office asked that Rutherford be posted in early afternoon and a number of other publicly accessible scholarship applications be posted by end of day.
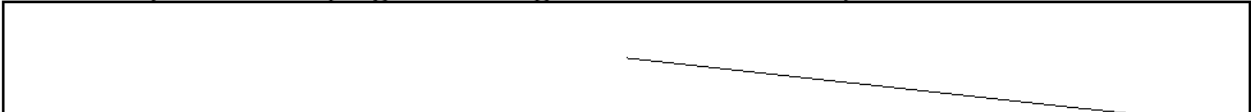- 24 (1) (a)

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- Following media coverage on August 4 about Rutherford not being available, the department was directed to make Rutherford available at 3:00 pm.

ANALYSIS

- The issues realized through development of the new system were previously identified as potential risks in project documentation.
  - Mitigation strategies were put in place, however risks were not able to be fully mitigated for a number of reasons including project complexity, implementation of business process changes in tandem with system development, and availability of resources.
- Other scholarships and awards remain delayed as the development of the new system continues.
- Without the new system, manual processes will be required to administer the scholarship and award programs, causing a higher risk of human error, delays in processing payments to recipients, and increased inquiries from students and other stakeholders.
- Program staff have already altered business processes in partnership with the delivery partners (other government departments and institutions) to align with the new system. Delivery partners are prepared to deliver with the new processes.
- Scholarship and award program funding for 2019/2020 is not yet confirmed.
-

24 (1) (a)

MOVING FORWARD

- DM will be raising more operational matters with Ministers Office for awareness and has prepared a summary of scholarship related timelines for the Minister (attachment 1).
- Internal processes and timelines within the Apprenticeship and Student Aid division, Service Alberta Workforce Development sector and the Communications branch will be reviewed and revised to ensure public information is provided earlier for DM sign off.
- AE will continue to work closely with Service Alberta to ensure timelines for the project are maintained.

ATTACHMENT: Scholarship Transformation Project Timeline

CONTACT: Andy Weiler, Assistant Deputy Minister
Apprenticeship and Student Aid, 780-644-7732

Accept all changes and it's good to go.

Alberta Government

ADVICE TO DEPUTY MINISTER

ALEXANDER RUTHERFORD SCHOLARSHIP DELAY

PURPOSE
To provide an overview of Advanced Education's (AEs) Alexander Rutherford Scholarship delay that occurred in August 2019.

BACKGROUND
- The development of programs over several decades has resulted in a complex suite scholarships and awards delivered by the Government of Alberta (more than 10 times that of any other province/territory) with significant variances in amounts, application cycles, eligibility criteria, requirements, and delivery methods.
  - This is a significant administrative burden for students, post-secondary institutions, and government, with many manual processes needed to respond to program variety and diversity.
- Beginning in 2015, Advanced Education conducted a comprehensive review of all scholarships and awards programs.
- The review resulted in the establishment of the Scholarships Business Transformation Project with the purpose of identifying and implementing administrative improvements to enhance client service, increase efficiency, strengthen accountability, and support development of a future state vision.
  - Institutions and students confirmed support for the department's objectives to improve programming through surveys and engagement meetings.
- Part of the project included replacing the existing aging IT system used to administer/pay approximately 36 scholarships and awards.
  - This was necessary as the system was being decommissioned in December 2019
- The new system will replace the existing system, resulting in streamlined processes, and automated functions that are currently performed manually.
  - New system development began March 2018.
- Rutherford scholarships are currently housed on a different Alberta Student Aid system than the other 36 scholarships on the aging legacy system
  - Rutherford is AEs largest scholarship with approximately 19,000 recipients and $41 million in funding awarded in 2018/2019 fiscal year.
- The original plan was to have the new system in place at the end of July 2019 and all scholarship and award applications up on Aug 1, 2019.
  - In 2018, as part of the Scholarship Transformation Project, Student Aid consulted with stakeholders to align the business cycles of all scholarship and award programs.
  - Based on that engagement, cycles were adjusted and stakeholders were informed that all applications will be available August 1.

Page 1 of 4

- In February 2019, the scope to include Rutherford scholarships within the new system was approved with a target implementation date of November 2019.
- Starting in April 2019, work on a new system slowed as AE business area and Service Alberta IMT worked through a series of issues around outcomes and deliverables of the new system.
- In April and May 2019, senior leadership from Alberta Student Aid and Service Alberta IMT met to develop a go forward approach.
    - Rutherford scholarships was removed from scope in the development of the new system.
- In May, June, and July 2019 IMT resources were impacted by contracts not being renewed
    - Service Alberta has since implemented a mitigation strategy that pulled IT resources from other areas and the existing Student Aid vendor contract (CGI).
    - Onboarding and transition activities consumed capacity of other project team members to continue development at the same rate.
- In June a decision was made collectively by AE and Service Alberta that the end of July launch date could not be met and would have to be pushed out by several months.
- An implementation plan was developed to not post any scholarship applications on August 1, including Rutherford, and communicate publicly that work was occurring on an IT system that would result in the delay of posting applications.

24 (1) (a)

- An operational communications plan was developed with AE Communications Branch and signed off by the DM on July 30.
    - Copies of the communications material were shared with minister's office (MO) on the morning of July 30.
- Information was posted on the web and provided to post-secondary institutions, high schools, scholarship and award donors, other organizations and Government of Alberta departments about the delay in posting applications and the reason (development of new system).
- In additional to delays in the new system development, Student Aid continues to work on major transformation and redesign for Alberta Scholarships and Awards.
- The system to process and pay scholarship and award recipients will not be completed until late fall.
    - The new system is scheduled to go live end of later in October 2019.
- Over the course of July 30 to August 2, 2019, a number of conversations occurred between the department and MO.

- On August 2, the minister's office asked that Rutherford be posted in early afternoon and a number of other publicly accessible scholarship applications be posted by end of day.

- [ ]

24 (1) (a)

- Following media coverage on August 4 about Rutherford not being available, the department was directed to make Rutherford available at 3:00 pm.

ANALYSIS

- ~~The issues realized through development of the new system were previously identified as potential risks in project documentation.~~
    - ~~Mitigation strategies were put in place, however risks were not able to be fully mitigated for a number of reasons including project complexity, implementation of business process changes in tandem with system development, and availability of resources.~~
- Other scholarships and awards remain delayed as the development of the new system continues.
- ~~Without the new system, manual processes will be required to administer the scholarship and award programs, causing a higher risk of human error, delays in processing payments to recipients, and increased inquiries from students and other stakeholders.~~

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- ~~Program staff have already altered business processes in partnership with the delivery partners (other government departments and institutions) to align with the new system. Delivery partners are prepared to deliver with the new processes.~~
- ~~Scholarship and award program funding for 2019/2020 is not yet confirmed.~~

24 (1) (a)

- [ ]

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    - Mitigation strategies were put in place, however risks were not able to be fully mitigated for a number of reasons including project complexity, implementation of business process changes in tandem with system development, and availability of resources.
-

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MOVING FORWARD

- DM will be raising more operational matters with Ministers Office for awareness and has prepared a summary of scholarship related timelines for the Minister (attachment 1).

- Internal processes and timelines within the Apprenticeship and Student Aid division, Service Alberta Workforce Development sector and the Communications branch will be reviewed and revised to ensure public information is provided earlier for DM sign off.
- AE will continue to work closely with Service Alberta to ensure timelines for the project are maintained.

ATTACHMENT: Scholarship Transformation Project Timeline

CONTACT: Andy Weiler, Assistant Deputy Minister
Apprenticeship and Student Aid, 780-644-7732

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Other document that you can upload with the one I just sent you.

Scholarship Transformation Project		
Timeline	**Item**	**Description**
November 2015	Scholarship Business Transformation Project Terms of Reference Approved	The Scholarship Business Transformation Project launched. TOR defines purpose of project from a business perspective. Project purpose was to identify short term and long-term opportunities to transform the design and delivery of scholarship programming administered by Student Aid in order to improve client services and operate more efficiently. SA began defining the current state of scholarship programming.
December 2015 – February 2016	Scholarships and Awards Current State Review and Moratorium Conversations	Based on current state analysis recommendations were put forward to place certain programs on moratorium in order to give business time to review programs and their intent. **Deputy Minister (DM) approval not provided.**
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January 2017 – May 24, 2017	Stakeholder Engagement	As part of the Tuition and System Resourcing review approved by Cabinet in September 2016, Advanced Education conducted a stakeholder engagement to consider how student aid programming can support the adult learning principles of accessibility and affordability. Staff met with various stakeholders, including: Alberta Students' Executive Council (ASEC), Council of Alberta University Students (CAUS), the Alberta Graduate Provincial Advisory Council (ab-GPAC); Deans of Graduate Studies, and various government departments that partner with SA in scholarship delivery.
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September 2017	Scholarships go-forward strategy report	IMT and Student Aid collaborated on a Scholarships go-forward strategy report. The recommendation was to build an in-house solution that would reuse, leverage or extend the existing scholarships solution.
September 2017 – February 2018	Policy Decisions Delayed, no direction provided to move forward	During this time, IMT was in a position to begin the system development to ensure system availability, however business area was awaiting direction from government on potential changes to student aid programming.
February 2018	BN requesting to move forward with only Operational Improvements to Scholarship Programming	SA requested approval to move forward with operational improvements since broader policy recommendations specific to scholarships and awards were not approved.

1

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February 2018	IMT Scholarship Business Case Approval	**ED approval provided** to begin system work on the first part of the scholarship project. The Scholarship project consists of 5 parts: 1) Scholarships Core Foundation 2) Online self service 3) Confirmation of registration, Scholarship Dashboard and Enhanced reporting 4) Third Party Access 5) Scholarships key policy changes and enhancements
February 2018	IT Project Initiated and Project Charter development	Project kicked off and Phase 1 Project Charter submitted for review and approval. • Phase 1 – Scholarship Core Foundation Project target completion March 2019.
March 2018	IMT and Business Project Kick off	Team meetings and working group sessions began to understand business requirements.
March 2018 – April 2018	Finalized Business project charter for Scholarships Transformation Part 1	The goal of the project is to create improvements that advance a future state vision of providing complementary programs with clearly defined outcomes that are understood and accessible to target audiences; administered through standardized and consistent policies, processes, and procedures; and delivered seamlessly through an automated system solution.
March 2018 – November 2018	Finalized IT Project Charter for Scholarships Transformation Part 1.	Divergence from original scope outlined in the business case and project charter. The scope was negotiated with the business and due to business transformation running in parallel to the IT project it contributed to a delay in scope and requirements finalization.
June 2018 – September 2018	Stakeholder Engagement regarding operational improvements to programs	Student Aid conducted a stakeholder engagement with all impacted stakeholders including post-secondary institutions, donors, athletic organizations, high schools, and government departments. Engagement focused on improving the delivery of scholarship programming by aligning, amalgamating, or changing the delivery model of a scholarship in order to streamline administration and provide better service to students, stakeholders, and government staff.
October 2018	Created the Graduate Scholarships Working Group	The working group was established to assess programs that can be amalgamated at the graduate level and design a new Graduate program with eligibility criteria that supported stakeholder engagement feedback. The Alberta Graduate Excellence Scholarship was created and it amalgamated 7 programs that were all administered differently in the past.

2

Scholarship Transformation Project		
Timeline	**Item**	**Description**
November 2018	Created the Scholarship Project Steering Committee	**The Steering Committee is the decision-making governance body for the project**. Membership consisted of Student Aid project team members as well as IMT project team members to ensure a shared understanding of the scholarship business transformation.
November 2018	Decision Request 001 Conformation of Registration (COR) for Scholarships Approved	A decision was required to leverage full-time confirmation of registration for students enrolled in full-time study for all other programs but Rutherford in the new system solution. In 2016, Rutherford began leveraging full time confirmation of registration. **Steering Committee approval provided.**
	Decision Request 002 Scholarship Schedule Adjustment Approval	Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons. The team proposed splitting Part 1 of project into 2 releases. Release 1 – Go live July 26, 2019 Release 2 – Go live November 2019 Scholarship Project **Steering Committee approved the option and requested team moves forward with a Change Request.**
February 2019	Decision Request 003 Rutherford Application Availability Change Approval	Business requested Rutherford application availability be changed from June to August 1 to align with Scholarship annual application cycles and detach processes from loans and grants. **Steering Committee approval provided.**
	Decision Request 004 Alberta Graduate Excellence Scholarship (AGES) Approval	Scholarship Project **Steering Committee provided approval** to proceed with the new Alberta Graduate Excellence Scholarship. Once budget approvals are provided the program would proceed with implementation with the institutions.
	Decision Request 005 Jason Lang Delivery Approval	A decision was required on which method of delivery to leverage for the Jason Lang scholarship in the new system solution and clean-up the eligibility criteria. Scholarship Project **Steering Committee provided approval** to leverage the new uploader solution in the system and program administration change to the institutions.
February 2019	IMT Project Change Request # 1	The two major milestones affected by this Change Request are as follows: • The new deployment target date is July 25, 2019. • Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019.
April 2019	Scholarship Steering Committee Meeting: Organizational / Program Transformation & IMT Perspectives	A Scholarship Steering Committee working group was facilitated by Student Aid and IMT to assist all participants in understanding the existing challenges and gaps between Student Aid and IMT as it relates

3

Scholarship Transformation Project		
Timeline	**Item**	**Description**

		to the Scholarship Transformation Project. The conversation focused on understanding the divergence in expectations and approach when it comes to transformation activities and system development and to reach a shared understanding for the approach going forward.
		
		The following next steps were identified:
		- Finalize production release (July 25th) and proceed with Scholarships Part 1 release 1
		- Provide a demo of the current developed scholarship product to all key stakeholders
		- Identify and engage the right people from IMT and Student Aid in the development of options for Part 1, Release 2 (Rutherford scope)
		- Hold a Steering Committee working group #2 in May focusing on reviewing the IMT and Business Project Charters to:
		  o Understand where Student Aid and IMT were not on the same page with respect to expectations for scholarships transformation and approach towards system development to meet transformation objectives
		  o Understand what contributed to that divergence in understanding, and
		  o Agree on the primary focus and objectives of scholarships transformation going forward and approach needed by the team to meet those objectives and understand all options available
		
		The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

May 2019	Scholarship Steering Committee Meeting #2: Organizational / Program Transformation & IMT Perspectives	A continuation of conversation from the April Steering Committee working group. Conversations focused on a deeper dive into the diverging expectations from both IMT and Business and future direction of the Scholarship Transformation project. Steering Committee made the decision to postpone future phases of the Scholarship project in order to ensure successful delivery of phase 1. The challenges highlighted above resulted in an impact on project scope, cost, and schedule.
May 2019	IMT Contingent Labour Procurement Changes	As of May 17, 2019, a new process regarding contracts and grants approval was implemented. All contracts and grants require approval by a committee of Deputy Ministers. Two resources (Program Manager and UAT Coordinator) have been impacted in May. **A number of scholarships technical resources were impacted by the GoA contract approval processes** and will be assessed as necessary.

4

Scholarship Transformation Project		
Timeline	**Item**	**Description**
June 2019	IMT Project Change Request # 2	The two major milestones affected by this Change Request are as follows: • New target date is October 24, 2019. • Alexander Rutherford Scholarship will not be removed from the Students Finance System (SFS) and migrated to the new scholarships solution.

July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
		  • Release 2 includes remaining functionality and planned for late 2019.

October 2019	IT System Go Live Date	Planned go live date – October 24th 2019

Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager
Project Manager	Resource resigned June 2019	CGI resource started July 2019
Business Analyst	Contract expired June 2019	No replacement required – business requirements complete
Developer	Contract expired June 2019	Resource started in June 2019
Developer	Contract expired July 2019	CGI resource started August 2019
Developer	New role added	CGI resource started August 2019

5

Project Roles	Resource change reason	Mitigation Decisions
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
Tester (Performance)	New role added	Resource started July 2019

Impacts of resourcing changes include but are not limited to:

- Loss of corporate knowledge
- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business process and scholarship transformation activities that affect the technical solution.

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Risk	Mitigation
Project success is dependant on a technical team with Student Finance System (SFS) experience and business team with detailed scholarships knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

7

From:	Andy Weiler
To:	Maggie DesLauriers
Cc:	Stacey Reynhoudt
Subject:	RE: Scholarship Transformation Project Timeline - Aug 9th 2019
Date:	Friday, August 09, 2019 4:12:00 PM
Attachments:	image001.png
	57048.doc
	Scholarship Transformation Project Timeline.docx

I trimmed the BN to Ray and removed one section of the timeline that reference the CR work we were doing a couple years back. These have both been uploaded to ARTs for Rod's review on Monday.

From: Maggie DesLauriers
Sent: Friday, August 09, 2019 3:44 PM
To: Andy Weiler
Cc: Aneta Rans ; Mallory Nault ; Salima Hemani ; Stacey Reynhoudt ; Lisa LHirondelle ; Warren Goertzen
Subject: RE: Scholarship Transformation Project Timeline - Aug 9th 2019
Hi Andy
Stacey and I discussed and once the BN and timeline are approved by you, Stacey will share it with Stephen

From: Andy Weiler <andy.weiler@gov.ab.ca>
Sent: August 9, 2019 3:27 PM
To: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Mallory Nault <Mallory.Nault@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>
Subject: RE: Scholarship Transformation Project Timeline - Aug 9th 2019
Thanks Maggie and all for this great work! Appreciate it. Has Stacey seen and approved and is she showing it to Stephen?

From: Maggie DesLauriers <Maggie.DesLauriers@gov.ab.ca>
Sent: Friday, August 09, 2019 3:14 PM
To: Andy Weiler <andy.weiler@gov.ab.ca>
Cc: Aneta Rans <Aneta.Rans@gov.ab.ca>; Mallory Nault <Mallory.Nault@gov.ab.ca>; Salima Hemani <Salima.Hemani@gov.ab.ca>
Subject: Scholarship Transformation Project Timeline - Aug 9th 2019
Hi Andy
Attached is the updated timeline, apologies for the delay. I left a couple of the comments where you had question.
We will send along the version with the attachments shortly. A big thanks to Aneta, Salima and team in pulling all this together
Maggie

Maggie DesLauriers
Executive Director, Student Aid
Alberta Advanced Education
P: 780.422.4498
C: 780.717.9250
www.studentaid.alberta.ca

ADVICE TO DEPUTY MINISTER

<u>ALEXANDER RUTHERFORD SCHOLARSHIP DELAY</u>

PURPOSE
To provide an overview of Advanced Education's (AEs) Alexander Rutherford
Scholarship delay that occurred in August 2019.

BACKGROUND
- Beginning in 2015, Advanced Education conducted a comprehensive review of all
  scholarships and awards programs.
- The review resulted in the establishment of the Scholarships Business
  Transformation Project with the purpose of identifying and implementing
  administrative improvements to enhance client service, increase efficiency,
  strengthen accountability, and support development of a future state vision.
  - Institutions and students confirmed support for the department's objectives to
    improve programming through surveys and engagement meetings.
- Part of the project included replacing the existing aging IT system used to
  administer/pay approximately 36 scholarships and awards.
  - This was necessary as the system was being decommissioned in December
    2019
- The new system will replace the existing system, resulting in streamlined processes,
  and automated functions that are currently performed manually.
  - New system development began March 2018.
- Rutherford scholarships are currently housed on a different Alberta Student Aid
  system than the other 36 scholarships on the aging legacy system
  - Rutherford is AEs largest scholarship with approximately 19,000 recipients
    and $41 million in funding awarded in 2018/2019 fiscal year.
- The original plan was to have the new system in place at the end of July 2019 and
  all scholarship and award applications up on Aug 1, 2019.
- In February 2019, the scope to include Rutherford scholarships within the new
  system was approved with a target implementation date of November 2019.
- Starting in April 2019, work on a new system slowed as AE business area and
  Service Alberta IMT worked through a series of issues around outcomes and
  deliverables of the new system.
- In April and May 2019, senior leadership from Alberta Student Aid and Service
  Alberta IMT met to develop a go forward approach.
  - Rutherford scholarships was removed from scope in the development of the
    new system.
- In May, June, and July 2019 IMT resources were impacted by contracts not being
  renewed

- – Service Alberta has since implemented a mitigation strategy that pulled IT resources from other areas and the existing Student Aid vendor contract (CGI).
- – Onboarding and transition activities consumed capacity of other project team members to continue development at the same rate.
- In June a decision was made collectively by AE and Service Alberta that the end of July launch date could not be met and would have to be pushed out by several months.
- An implementation plan was developed to not post any scholarship applications on August 1, including Rutherford, and communicate publicly that work was occurring on an IT system that would result in the delay of posting applications.
- An operational communications plan was developed with AE Communications Branch and signed off by the DM on July 30.
  - – Copies of the communications material were shared with minister's office (MO) on the morning of July 30.
- Information was posted on the web and provided to post-secondary institutions, high schools, scholarship and award donors, other organizations and Government of Alberta departments about the delay in posting applications and the reason (development of new system).
- The system to process and pay scholarship and award recipients will not be completed until late fall.
  - – The new system is scheduled to go live later in October 2019.
- Over the course of July 30 to August 2, 2019, a number of conversations occurred between the department and MO.
- On August 2, the minister's office asked that Rutherford be posted in early afternoon and a number of other publicly accessible scholarship applications be posted by end of day.
-

24 (1) (a)

- Following media coverage on August 4 about Rutherford not being available, the department was directed to make Rutherford available at 3:00 pm.
- Other scholarships and awards remain delayed as the development of the new system continues.
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24 (1) (a)

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Page 2 of 3

– Mitigation strategies were put in place, however risks were not able to be fully mitigated for a number of reasons including project complexity, implementation of business process changes in tandem with system development, and availability of resources.

MOVING FORWARD

- DM will be raising more operational matters with Ministers Office for awareness and has prepared a summary of scholarship related timelines for the Minister (attachment 1).
- Internal processes and timelines within the Apprenticeship and Student Aid division, Service Alberta Workforce Development sector and the Communications branch will be reviewed and revised to ensure public information is provided earlier for DM sign off.
- AE will continue to work closely with Service Alberta to ensure timelines for the project are maintained.

ATTACHMENT: Scholarship Transformation Project Timeline

CONTACT: Andy Weiler, Assistant Deputy Minister
           Apprenticeship and Student Aid, 780-644-7732

Scholarship Transformation Project		
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	Decision Request 002 Scholarship Schedule Adjustment Approval	Scholarship project encountered a schedule delay due to technical, resource, and organizational reasons.

The team proposed splitting Part 1 of project into 2 releases.

Release 1 – Go live July 26, 2019
Release 2 – Go live November 2019

Scholarship Project **Steering Committee approved the option and requested team moves forward with a Change Request.** |
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Scholarship Project **Steering Committee provided approval** to leverage the new uploader solution in the system and program administration change to the institutions. |
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• The new deployment target date is July 25, 2019.
• Alexander Rutherford Scholarship (ARS) will be delivered as a second phase and the target deployment date is November 21, 2019. |
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Scholarship Transformation Project		
Timeline	**Item**	**Description**

		to the Scholarship Transformation Project. The conversation focused on understanding the divergence in expectations and approach when it comes to transformation activities and system development and to reach a shared understanding for the approach going forward.
		
		The following next steps were identified:
		- Finalize production release (July 25th) and proceed with Scholarships Part 1 release 1
		- Provide a demo of the current developed scholarship product to all key stakeholders
		- Identify and engage the right people from IMT and Student Aid in the development of options for Part 1, Release 2 (Rutherford scope)
		- Hold a Steering Committee working group #2 in May focusing on reviewing the IMT and Business Project Charters to:
		   o Understand where Student Aid and IMT were not on the same page with respect to expectations for scholarships transformation and approach towards system development to meet transformation objectives
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		The challenges highlighted above resulted in an impact on project scope, cost, and schedule.

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Scholarship Transformation Project		
Timeline	**Item**	**Description**
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July 2019	New IMT Project Manager (PM) transition	New Project Manager transition included a project plan review taking into consideration the following:
		• Mandatory project delivery timeline identified as October 24, 2019.
		• Potential schedule impacts resulting from contingent labour resource changes.
		
		As a result, the following changes were implemented:
		• Additional resources were engaged to meet the delivery timeline
		• Scope was split across two releases:
		  • Release 1 includes all core scholarship functionality.
		  • Release 2 includes remaining functionality and planned for late 2019.

October 2019	IT System Go Live Date	Planned go live date – October 24th 2019

Scholarship IMT Project Resourcing

The project team consist of fifteen roles. The table below identifies the role, the change and the mitigation decisions for the nine resourcing changes that occurred over the past four months:

Project Roles	Resource change reason	Mitigation Decisions
Program Manager	Contract expired May 2019	Role transitioned to Portfolio Delivery Associate Director and Project Manager
Project Manager	Resource resigned June 2019	CGI resource started July 2019
Business Analyst	Contract expired June 2019	No replacement required – business requirements complete
Developer	Contract expired June 2019	Resource started in June 2019
Developer	Contract expired July 2019	CGI resource started August 2019
Developer	New role added	CGI resource started August 2019

Project Roles	Resource change reason	Mitigation Decisions
Application Architect	Contract expired May 2019	Resource returning August 2019
Tester (Co-ordinator)	Contract expired May 2019	CGI resource started August 2019
Tester (Performance)	New role added	Resource started July 2019

Impacts of resourcing changes include but are not limited to:

- Loss of corporate knowledge
- Learning curves and associated ramp up costs
- Increased onboarding and transitioning activities consuming capacity of other project team members to effectively operate
- Finding resources with the right skill sets.
- Learning curves and associated ramp up costs. Need to learn the application (no resource overlap to transition knowledge and work assignments)
- Lag time – slow down on work to make sure maintenance of quality product.

Scholarship IMT Project Risks

The table below outlines the key risks identified in the IMT Project Charter. During the project delivery the mitigation strategies were implemented and the project schedule, scope and cost have been documented through the IT Project Change Management process (IMT Change Request 1 and IMT Change Request 2). :

Risk	Mitigation
Enterprise Architecture is mandating that applications be developed as modules of functionality as opposed to a single large application. This is a new development approach for the team so development estimates may not be as accurate as they were for traditional development.	The Solution Architect assigned to the project is familiar with this approach and will mentor the Development team on the new approach and assist with development estimates.
The scholarship solution will be developed using Angular, which is a new development language for the Development team.	The Solution Architect assigned to the project is familiar with Angular and will mentor the Development team on the new approach.
Scholarships business is carrying out their scholarship transformation activities while the Scholarships solution is being developed. Changing requirements could impact the project schedule.	The business and technical Project Managers will meet on a weekly business with representatives from the Scholarships team to discuss business process and scholarship transformation activities that affect the technical solution.

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Risk	Mitigation
Project success is dependent on technical team with Student Finance System experience and business team with detailed school area knowledge. A loss of any resources identified for the project will have a negative project impact.	It is not always possible to foresee resource changes. This is a risk on all projects and the current resource procurement processes (FlexTrack or CGI) will be followed to address any resource needs.

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