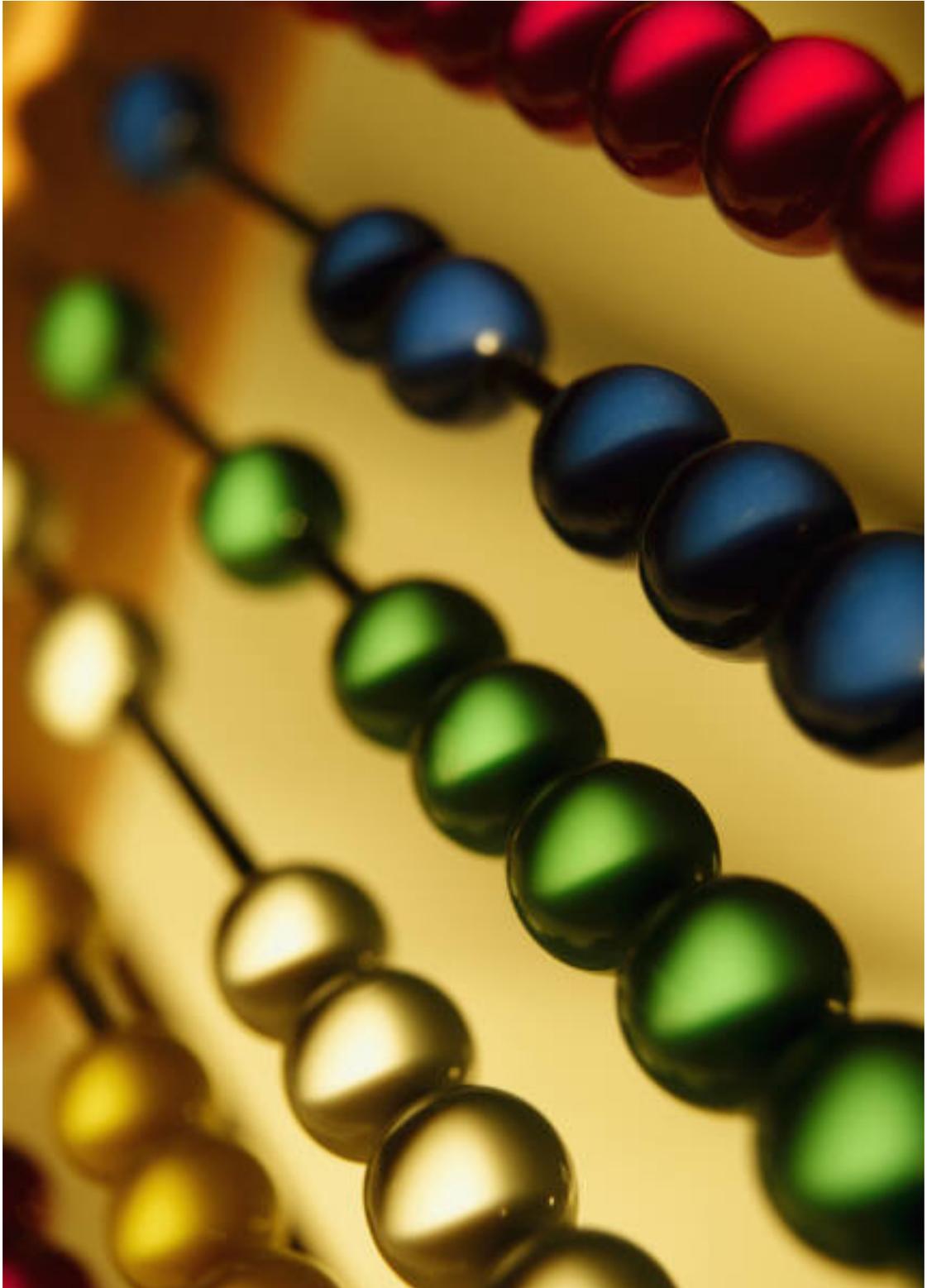


*Bi-Weekly Report as of March 19, 2004*



*FSA Performance Plan – FY2004*

# SUMMARY

## COMPLETED PROJECTS

- 

## GREEN LIGHT

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## YELLOW LIGHT

- Acceptance testing on the EDEExpress Pell and Direct Loan module has been extended to add three new requirements and fix two issues. Because of the addition of these new requirements the software will not be posted to FSAdownload until the first week of April, missing the target completion date of March 2004. This Project (*Project 4 – Provide EDEExpress application modules*) is reported as 98% complete. Despite the missed target date, the schools will not be adversely impacted, as they will not have started 2004-2005 processing.
- Discussions continue with OMB regarding the extension of the eZaudit application. (*Project 8 – Expand eZaudit initiative*). The transition to operations will begin October 1, 2004, and will take 30-60 days to complete the transfer of business. This is contingent on availability of FY 2004 funding.

## MISSED TARGET DATES

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- 
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## CANCELLED

-

# ACTION PLAN STATUS AT A GLANCE

as of March 19, 2004

FSA No.	Indicator	Status
1	<b>IMPLEMENT STUDENT AID AWARENESS INITIATIVES</b>	
1.1	Leverage partnership activities to disseminate FSA information	
1.2	Publish accurate and timely information that meets the needs of our audience	
1.3	Disseminate information directly to target audience	
1.4	Respond accurately and timely to requests	
1.5	Reach customers through Student Aid on the Web	
2	<b>IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER</b>	
2.1	Monitor customer feedback to improve services	
3	<b>CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)</b>	
3.1	Implement application	
4	<b>PROVIDE EDEXpress APPLICATION MODULES</b>	
4.1	Release application module	
4.2	Release Common Origination and Disbursement module	
5	<b>PROCESS PELL &amp; DIRECT LOAN TRANSACTIONS THROUGH COD</b>	
5.1	Issue COD software release	
5.2	Issue COD SOO	
6	<b>ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES</b>	
6.1	Prepare list of schools that do not submit FISAP; call schools to ensure compliance prior to tentative award notification	
6.2	Notify schools of tentative awards	
6.3	Call remaining schools that have not submitted FISAPs or that need to correct FISAPs prior to required closure of database	
6.4	Issue final awards to schools	
6.5	Issue FISAP software release	
7	<b>UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)</b>	
7.1	Complete Oracle 9i Upgrade	
7.2	Upgrade Windows NT server that houses the E-App	
8	<b>EXPAND eZAUDIT INITIATIVE</b>	
8.1	Commence contract start-up	
8.2	Complete first full cycle of processing (all school types)	
8.3	Improve audit review component of compliance activities by increasing the e-submission rate to 95%	
9	<b>ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP &amp; DEL SERV)</b>	
9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year	
9.2	Continue to measure school monitoring to assess overall compliance trends	
9.3	Conduct School Relations initiatives	
9.4	Conduct Experimental Sites initiative	
9.5	Administer the Quality Assurance program	
9.6	Conduct vulnerability assessment	
10	<b>PRODUCE SCHOOL PUBLICATIONS AND MATERIALS</b>	
10.1	Annually update and disseminate the Federal Student Aid Handbook	
10.2	Update and disseminate Direct Loan Program publications	
11	<b>DEVELOP &amp; DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS</b>	
12	<b>TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)</b>	
13	<b>ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)</b>	
13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more	
13.2	Update FSA-wide risk management and default prevention inventory.	
13.3	Complete the work on the implementation of the life-time default rate measure.	
13.4	Identify and enhance current delinquency/default prevention tools for the DLProgram	
13.5	Conduct vulnerability assessment	

## ACTION PLAN STATUS AT A GLANCE

as of March 19, 2004

FSA No.	Indicator	Status
14	IMPLEMENT HIGH QUALITY CUSTOMER SERVICE TO THE DL PORTFOLIO	
15	IMPLEMENT PLAN TO IMPROVE CONTRACTOR OVERSIGHT TO DL CONSOLIDATION OVERPAYMENTS/UNDERPAYMENTS	
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	
16.1	Perform cohort default rate calculations, send, and post	
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes	
16.5	Participate in the formulation of school cohort default rate initiatives	
16.6	Provide monitoring functionality of GA and Lender reasonability on a monthly basis	
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP	
16.8	Implement Education Credit Management Corporation (ECMC) file format changes	
17	RE-COMPETE CONTRACT FOR NSLDS MAINTENANCE/OPERATIONS	
17.1	Award new contract	
17.2	Monitor and manage transition to new contractor	
18	RE-COMPETE CONTRACT FOR FP DATA MART MAINTENANCE/OPERATIONS	
18.1	Award new contract	
18.2	Monitor and manage transition to new contractor	
19	PERFORM MAINTENANCE/OPERATIONS ACTIVITIES FOR THE FP DATA MART	
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	
20.1	Monitor and evaluate web page hits to drive future postings to portal	
20.2	Maintain current and relevant information to financial partners' user community	
20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal	
21	PERFORM LEAP/SLEAP ACTIVITIES	
21.1	Review, evaluate, reconcile, and prepare performance reports	
21.2	Prepare and submit clearance paperwork	
21.3	Review/approve applications from states. Obligate, generate, and mail grant award notifications	
22	PERFORM VOLUNTARY FLEXIBLE AGREEMENT (VFA) ACTIVITIES	
22.1	Perform cost neutrality analysis and provide results	
22.2	Prepare performance measure assessment and benchmarking reports	
22.3	Evaluate new applications for VFA	
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	
23	PERFORM MAINTENANCE/IMPROVEMENTS TO THE FP ELECTRONIC RECORDS MANAGEMENT (ERM) SYSTEM	
23.1	As appropriate, integrate ERM work with other FSA business units	
23.2	Analyze and evaluate the current use of the ERM system to identify improvements	
24	PROMOTE EFFECTIVE/EFFICIENT COMMUNICATIONS INTERNALLY & EXTERNALLY	cancelled
24.1	Coordinate and enhance communications within Financial Partners and externally	cancelled
24.2	Hold quarterly checkpoints for all areas of FP service concerning communications	cancelled
25	ENHANCE PROGRAM MONITORING & OVERSIGHT (FP)	
25.1	Participate and provide Financial Partners Channel support for ED audit	
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	

## ACTION PLAN STATUS AT A GLANCE

as of March 19, 2004

FSA No.	Indicator	Status
25.3	Analyze and collect third-party audit findings	
25.4	Utilize GA/lender scorecards to reduce risk and improve review process	
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI)	
25.6	Conduct vulnerability assessment	
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	
30	MANAGE FMS OPERATIONS	
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	
37.1	Release GovLoans Gateway	
38	PROVIDE HIGH QUALITY INFORMATION, RESEARCH AND INFORMAL PROBLEM RESOLUTION SERVICES TO STUDENT LOAN BORROWERS AND OTHER PARTICIPANTS IN STUDENT AID PROGRAMS	
39	CONDUCT REAUTHORIZATION ACTIVITIES	
40	POLICY LIAISON PLACEHOLDER	
41	PLAN AND MANAGE FSA CONFERENCES	
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	
45	MATURE ENTERPRISE-WIDE PROCUREMENT PLAN	
45.1	Complete market research to resolve plan issues	
45.2	Synch Plan w/BIG End State Vision	
46	DEVELOP ACQUISITION WORKFORCE	
47	IMPLEMENT ENTERPRISE CONTRACT PERFORMANCE MONITORING MEASURES AGAINST NEW SYSTEMS CONTRACT AWARDS	
47.1	Incorporate CSB into enterprise process	
47.2	Incorporate Front-End Business Integration Systems (FEBI) into enterprise process	
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	
48.1	Establish monitoring and reporting process for government furnished property	
48.2	Establish reporting process to monitor vendor performance	
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	

# ACTION PLAN STATUS AT A GLANCE

as of March 19, 2004

FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	
54.1	Continue Intern Program	
54.2	Conduct FSA Orientation	
54.3	Implement results of One-ED Competitions	
54.4	Update Skills Catalog/Learning Tracks	
54.5	Implement Workforce Alignment Strategy	
55	PERFORM FACILITIES MANAGEMENT ACTIVITIES	
55.1	Implement facilities needs	
55.2	Coordinate security needs	
55.3	Administer records management	
55.4	Coordinate the distribution of the Transit-Benefit program	
56	REVIEW CREDIT REFORM ESTIMATES	
57	DEVELOP TRIAL BALANCE CAPABILITY FOR COD AND CSB	
58	SUPPORT THE IMPLEMENTATION OF ORACLE FEDERAL FINANCIALS RELEASE 11i	
59	IMPLEMENT AUTOMATED BUDGET FUNDING ENTRY SOLUTION	
60	IMPLEMENT FORMS 2000 ADDITIONAL ENHANCEMENTS	
61	IMPLEMENT ENTERPRISE DATA STRATEGY INITIATIVES	
61.1	Map current state and future state business flows of data	
61.2	Develop requirements and initial design for common identifiers for schools and students	
61.3	Develop an integrated data warehouse and Data Mart strategy	
61.4	Develop technical standards, conventions and data management guidelines	
61.5	Determine current data quality and establish a target state plan and quality assurance process	
61.6	Develop an enterprise-wide extensible markup language (XML) technical architecture framework to enhance data sharing and standardization with our external customers	
61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management Oversight (eCMO), NSLDS and electronic Campus-based systems	
61.8	Conduct market research to validate the feasibility of the target conceptual design	
61.9	Develop the detail Data Quality Execution Plan	
61.10	Develop a holistic XML Management Plan	
61.11	Implement SSIM as a pilot on renewal applicants	
62	BEGIN THE IMPLEMENTATION OF COMMON SERVICES FOR BORROWERS (CSB)	
62.1	Award Contract	
62.2	Begin implementing Phase I of the FSA-approved transition plan	
63	IMPROVE SCHOOL PARTNER OVERSIGHT	
63.1	Implement Integrated Partner Management (IPM) system	
63.2	Develop Consolidated requirements for IPM system	
63.3	Develop enrollment high-level design	
63.4	Develop access high-level	
63.5	Develop Routing ID (RID) high-level design	
63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system	
63.7	Begin requirements gathering for eCMO	
63.8	Procure the design of a workflow tool for SEC	
64	IMPROVE THE ACCURACY OF APPLICANT DATA	
64.1	Improve the effectiveness of verification	

# ACTION PLAN STATUS AT A GLANCE

as of March 19, 2004

FSA No.	Indicator	Status
64.2	Restructure CPS to become a multi-year database	✓
64.3	Implement ISIR Data Mart	✓
65	CREATE A TARGET STATE VISION OF A FRONT END BUSINESS INTEGRATION (FEBI)	G
65.1	Conduct market research	✓
65.2	Issue CPS Statement of Objective (SOO)	✓
66	RE-ENGINEER NSLDS (PENDING DATA STRATEGY OUTCOME)	G
67	PREPARE TO IMPLEMENT IRS DATA MATCH	G
68	CONTINUE LEARNING COUPON PROGRAM	G
69	PROVIDE CAREER ZONE SERVICES	G
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	G
70.2	Develop and implement long-term mass marketing strategy	G
71	RE-ENGINEER EDExpress	Y
71.1	Conduct A & F Study with product registration	✓
71.2	Link application processing to FAA Access	✓
71.3	Implement Return to Title IV Web Release	Y
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	NR
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	G
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

**Key:**



On Track



Progress Concerns



Not Reported



Management Intervention Required



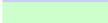
Completed

Cancelled

The project will not be completed in FY 2004 due to a shift in FSA leadership priorities, and therefore, unappropriated resources.



Operations



Discretionary

# FSA Project Status Report

FSA No	Area	Action Item	Status_Date	Comments	%Complete	Status
1	ADS	Implement student aid awareness initiatives.	3/19/2004	Exceeding expectations in several sub-tasks.	25%	Green
			3/5/2004	Exceeding expectations on several sub-tasks.	20%	Green
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).	3/19/2004	CSCC continue to make progress in 3 areas identified for improvement. There was a 2% increase in IFAP subscriptions from January 2004 to February 2004. Lotus Notes software update was completed. New Google search engine expected to be available by summer 2004.	47%	Green
			3/5/2004	Progress continues in all three areas identified for improvement. Link to mailing list added to IFAP home page to increase visibility. Lotus Notes software updates on track. Google search engine will not be installed before Spring Conference but is still on track.	43%	Green
4	ADS	Provide EDEExpress application modules.	3/19/2004	FSA Acceptance Testing on the Pell and Direct Loan module has been extended to add three new requirements, fix two issues and is scheduled for completion on March 19th. There are still a few Help Text issues to close from the earlier Acceptance testing. The PRR for the EDEExpress Pell and DL modules has been re-scheduled for March 31, 2004. PLEASE NOTE: Because of the addition of these new requirements the software will actually not be posted to FSA download until the first week of April. However, this does not adversely impact schools, as they will not have begun 2004-2005 processing. In addition: Requirements Tracking Summary and Customer Requirements Document for the Student Status Confirmation Report (SSCR) stand-alone module have been signed off. Detail Design Documents are due for review in two weeks. IST Testing for Release 2.0 (Pell and Direct Loan) with COD began on Monday, February 9th and continues with a few issues at this time.	98%	Yellow
			3/5/2004	FSA acceptance testing on the Pell and Direct Loan module has been extended to add three new requirements, fix two issues and scheduled for completion on March 19th. There are still a few Help Text issues to close from the earlier Acceptance testing. The PRR for the EDEExpress Pell and DL modules has been re-scheduled for March 31, 2004. In addition: Requirements Tracking Summary and Customer Requirements Document for the Student Status Confirmation Report (SSCR) stand-alone module have been signed off. Detail Design Documents are due for review in two weeks. IST Testing for Release 2.0 (Pell and Direct Loan) with COD began on Monday, February 9th and continues with a few issues at this time.	98%	Green
5	ADS	Process Pell and Direct Loan transactions through the Common Origination & Disbursement (COD) system.				

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/19/2004	Milestone 5.1 completed with successful implementation of new system functionality 3/12/2004 - 3/14/2004. COD System was ready to process 2004-2005 records on 3/15/2004.	62%	Green
			Milestone 5.2 continues on track for release of final RFP on 3/31/2004.		
		3/5/2004	Continue on track with both milestones. On schedule to be ready to process 2004-2005 records on 3/15/2004. Production Readiness Review (PRR) scheduled for 3/10/2004. Draft FEBI SOO was released to vendors on 2/27/2004.	57%	Green
6	ADS		<i>Administer Campus-Based (eCB) activities.</i>		
		3/19/2004	Project continues on track. Calls to schools with incomplete or inaccurate FISAPs (milestone 6.3) were completed by 3/15/2004 as projected. Final awards are on track to be issued on 3/23/2004. New software testing continues on track.	62%	Green
		3/5/2004	Project continues on track. Two out of five milestones have been completed, and progress continues to be made on remaining three--calling schools with incomplete or incorrect FISAPs by 3/15/2004, issuing final awards by 4/1/2004, and issuing new FISAP software by 6/30/2004.	57%	Green
			Note that revised milestones for this project were approved by the IPC.		
7	ADS		<i>Upgrade Postsecondary Education Participation System (PEPS).</i>		
		3/5/2004	Both milestones for this project have been completed. The PEPS HP server (UNIX) was upgraded to Oracle 9i on 12/21/2003. The Windows NT server that houses the E-App was upgraded on 2/28/2004.	100	Completed
8	ADS		<i>Expand eZAudit initiative.</i>		
		3/19/2004	Transition to Operations will begin on October 1, 2004 and will take 30-60 days to complete the transfer of business. This is contingent upon availability of FY04 funding. The project is on track to complete this transition on schedule. We are continuing discussions with OMB on extending the clearance of the eZaudit application.	65%	Yellow
			Changed Milestone 1 to be ready to award new operating contract by Oct 1, contingent on availability of 04 funding. First batch of audits rec'd in paper have either been submitted electronically, or we processed the paper copies. For the second batch of paper audits, we are calling the schools to ask them to submit electronically.		
		3/5/2004	Completion date for Milestone 1 has been approved by Kay Jacks as 9-30-04. The overall goal is to have a new operating partner on board by Oct 1. As a contingency plan, FSA could exercise 2 option periods under the current contract.	30%	Green
9	ADS		<i>Enhance program monitoring and oversight.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/19/2004	School Relations work continues as scheduled.  Experimental/X-Sites initiatives has received nearly all their annual reports.  QA completed Phase 2 of the ISIR reporting tool	43%	Green
		3/5/2004	Preparatory work continues on vulnerability assessment. See milestone 9.6 for details.  Audit issues have been resolved. Compliance issues need to be finalized though are not due yet.  Student relations issues are continuing to be met.  Experimental Sites have added more functionality to their annual report online reporting tool.  QA-Sites has accepted the ISIR Analysis Tool requirements  Strategy meeting for vulnerability assessment was held on 02-27-2004. Target studies scheduled to begin in May 2004. See milestone 9.6 for details.	35%	Green
10	ADS		<i>Produce school publications and materials.</i>		
		3/20/2004	Progress continues as the FSA Handbook is updated on the web.  Progress continues on revised Direct Loan counseling guides. Work on other Direct Loan publications that need to be revised continues. There are only two back-ordered requests at the warehouse. These requests are for one of the brochures that is currently being revised.	53%	Green
		3/5/2004	The FSA handbook is farther along than it was previously with only volume 5 needing a review.  Continue to have no outstanding or back-ordered requests for publications or documents at the warehouse. Direct Loan Counseling guides are on track for printing. Work on other Direct Loan publications is underway.	50%	Green
11	ADS		<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
<i>Status</i>	<i>Date</i>	<i>Comments</i>		
	3/20/2004	--Award new training contract by April 2004. 85 percent complete. Status: green Milestone: RFP for new training contract is "On the street" as of 3/17, and will close on April 2.	60%	Green
		--Implement new registration system by March 2004. 50 percent complete. Status: Yellow. (Additional market research has delayed the posting of the FEDBIZOPPS solicitation by approximately two weeks. Milestone: Fedbizopps notice should be posted by Monday, 3/22. Proposals are due one week after that.		
		--On an ongoing basis, review and analyze participant/instructor evaluations of training sessions, attendance data, adherence to budgetary constraints, and production schedules to ensure optimal delivery of FSA training programs. Will report the outcome of these analysis periodically. Ongoing. Approximately 40 percent of the analysis that is expected to be done in FY 04 is complete. Status: green.		
	3/4/2004	Award new training contract by April 2004. 80 percent complete. Status: green	57%	Green
		--Implement new registration system by March 2004. 50 percent complete. Status: Yellow. (Additional market research has delayed the posting of the FEDBIZOPPS solicitation by approximately two weeks.		
		--On an ongoing basis, review and analyze participant/instructor evaluations of training sessions, attendance data, adherence to budgetary constraints, and production schedules to ensure optimal delivery of FSA training programs. Will report the outcome of these analysis periodically. Ongoing. Approximately 40 percent of the analysis that is expected to be done in FY 04 is complete. Status: green.		
13	BS	<i>Enhance program monitoring and oversight.</i>		
	3/19/2004	Each of the milestones for this item is on track.	35%	Green
		Default Recoveries thru March 5, 2004 for non-consolidated loans was \$605.3 million. This is an increase of 35 percent over the same period in 2003 and 3.58 percent of the FY 2004 portfolio balance. This milestone is 45 percent complete.		
		The Risk Management Group is analyzing the data extracted from the Credit Management Data Mart (CMDM) related to Direct Loan Servicing and Debt Collection Services (DCS) to clarify inconsistencies in the data.		
		The FISMA Audit on the Direct Loan Servicing system was completed. Staff has reviewed the initial findings of the audit. After the exit review staff will consider findings and develop an action plan for correction. The corrections will be applied to the CSB network as well		
		The website mapping plan for the integration of all of Borrower Services websites is scheduled to be completed by March 22, 2004 for Phase 1.		
		FSA staff and the ACS Team are continuing work on phase one of the implementation plan.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/5/2004	Each of the milestones for this item is on track.	25%	Green
			Default Recoveries for non-consolidated loans was 3.51% over the same period in 2003. This milestone is 33 percent complete. The Risk Management Group is reviewing the characteristics and conditions of borrowers, in the non-consolidated Direct Loan portfolio for the period of 1994-1998, who have defaulted.		
			CIO and Direct Loan Servicing Group are conducting a FISMA Audit on Direct Loan Servicing system.		
			FSA staff and the ACS Team are continuing work on phase one of the implementation plan.		
14	BS		<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i>		
		3/19/2004	Requirements are still being developed for integration of all Borrower Services websites (Collections, Direct Loan Servicing, Direct Consolidation Loans) as part of the CSB deliverables. The website mapping plan that will detail the work is scheduled to be completed by March 22, 2004 for Phase 1. This will be our 50% milestone for this task.	40%	Green
		3/4/2004	Developing requirements for integration of all Borrower Services websites (Collections, Direct Loan Servicing, Direct Consolidation Loans) as part of the CSB deliverables.	25%	Green
15	BS		<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>		
		3/19/2004	Data for Direct Loan Consolidation underpayments and overpayments is available monthly. This item will be updated on the next reporting cycle.	25%	Green
		3/4/2004	This item is reported on monthly. There is no change for this reporting cycle.	25%	Green
16	FPS		<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>		
		3/19/2004	NSLDS Maintenance and Operations Activities operating efficiently. Task order work is nearly complete. Work on monthly Guaranty Agency reasonability will be conducted by the new contractor.	62%	Green
		3/5/2004	NSLDS Maintenance and Operations Activities operating efficiently. Task order work under the current contractor is mostly complete with one task order closed. NSLDS will reassess the need to continue work on GA monthly reasonability with the new contractor.	60%	Yellow
17	FPS		<i>Re-compete contract for NSLDS maintenance/ operations and transition to new contractor.</i>		
		3/19/2004	The transition of the NSLDS contract continues to make progress. The new contractor continues to increase its workload over the operations of NSLDS. The contract will be fully transitioned by 3.31.2004.	75%	Green
		3/5/2004	The transition of the NSLDS contract continues to make progress. The majority of documentation has been provided to the new contractor and the incumbent continues to provide expertise where needed. The system will begin full operations under the new contractor on Monday, 3.8.2004 and the customer support unit by Monday, 3.22.2004.	65%	Green
19	FPS		<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/19/2004	Maintenance and operations activities for this week include reprioritizing the Systems Investigation Report (SIR's), and discussing all outstanding scorecard issues.	40%	Green
		3/5/2004	Consolidated Lender Score Card recommendations and funding are being reviewed by management. Maintenance and operations activities for this week include reviewing and testing outstanding Systems Investigation Report (SIR's).	35%	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>			
		3/19/2004	Analysis for the 2nd quarter FP Portal Usage Report will start Thursday, 4.1.2004. Direct Loans and FFEL School data will be loaded the week of 4.12.2004. Revised format for the Final Analysis Report, with additional data, was accepted.	35%	Green
		3/5/2004	Analysis for the 2nd quarter FP Portal Usage Report will start Thursday, 4.1.2004. Direct Loans and FFEL School data will be loaded the week of 4.12.2004.	25%	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>			
		3/19/2004	Reviews of state annual performance reports have been completed. Program office staff continues to work with roughly 5% of states that are currently in a noncompliance status. Tentative award information is being sent to all states for upcoming aware year application cycle. Additionally, for those handful of states with outstanding compliance issues, they will be further notified of the possible impact of our not receiving amended reports may have on their future tentative awards. States will have to be in compliance or regain compliance before they can continue in the program. The status of the application form submitted into clearance for OMB Approval has been updated from "submitted" to "pending" approval. The deadline dates notice was forwarded to FSA's Policy Liaison and Implementation for departmental clearance.	72%	Green
		3/5/2004	Reviews of state annual performance reports have been completed. Program office staff continue to work with roughly 5% of states with some compliance issues.	70%	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>			
		3/19/2004	An action plan was implemented and milestones are being tracked on a daily basis to address meeting the Annual Cost Neutrality Report deliverable by the IPC approved delivery date of Friday, 4.30.2004. In addition, a new success criteria has been added to Project 22.2 to begin a pilot on 6.1.2004 of a monthly process to track, validate, and report on VFA Benchmarking and Performance data that will be used in the Quarterly VFA Benchmarking and Performance Data Report scheduled for implementation on 10.1.2004.	56%	Green
		3/5/2004	Action plans have been developed to address meeting the Annual Cost Neutrality Report deliverable by a revised date of Friday, 4.30.2004 (pending Mgmt. Council approval) and to address delivering Quarterly Performance Measure Reports according to the original completion date. Also made significant progress in a number of areas associated with the California Student Aid Commission while onsite for the VFA portion of the guarantor program review 2.23 - 27.2004.	54%	Green
23	FPS	<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>			

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		3/19/2004	A FP ERM Workgroup meeting is scheduled for Tuesday, 3.23.2004. The purpose of the meeting is to exchange information (between FP and the Student Eligibility Channel [SEC]) concerning file index issues and misfiled documents.	25%	Green	
		3/5/2004	A FP ERM Workgroup meeting is scheduled for Tuesday, 3.9.2004. The purpose of the meeting is to exchange information (between FP and the Student Eligibility Channel [SEC]) concerning file index issues and misfiled documents.	25%	Green	
25	<b>FPS</b>	<i>Enhance program monitoring and oversight.</i>				
		3/19/2004	FP continues to provide support for the ED audit. Copies of findings, reviews and audits were supplied to Ernst & Young to assist with the selection of review sites. Program reviews continued with site visits to the Texas Guaranteed Student Loan Corporation (TG), Northwest Education Loan Association (NELA) and ACS Education Services. Review of third party audit findings are on-going. FP staff continues to communicate with lenders. FP Management met NSLDS staff to discuss the scope of vulnerability assessment. NSLDS will identify success measures.	45%	Green	
		3/5/2004	FSA/CFO and Ernst & Young continue meeting on the ED Audit. FP is waiting for meeting outcome. On-site reviews are underway again. The review of the California Student Aid Commission was concluded during this period and the Texas guaranty agency review begin on Monday, 3.8.2004. It was determined that at least one of the Sallie Mae (SLMA) program review site visits will be moved out until October 2004. The CRI was approved on Thursday, 3.4.2004. FP Management has selected the National Student Loan Database System (NSLDS) for vulnerability assessment.	40%	Green	
26	<b>CFO</b>	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>				
		3/19/2004	FSA/CFO, OCFO, and Budget Service met with Ernst & Young (E&Y) to kick off the FY04 audit. Entrance Conferences for the Audit Steering Committee, and IT were set for April 6th. Several informal meetings with E&Y have taken place to discuss PBC items that will be requested in 2004, (GAs, DL, and FFEL).	10%	Green	
		3/5/2004	FSA/CFO, OCFO and Budget Service met with E&Y to kick off the FY04 audit. Discussions focused on prepared-by-client documentation process improvements, additional and accelerated reporting needs, and visits to FSA operating partners and related logistics.	09%	Green	
27	<b>CFO</b>	<i>Perform internal control reviews to enhance financial management.</i>				
		3/19/2004	Continuing to finalize SOO.	19%	Green	
		3/5/2004	SOO to support internal control reviews drafted. Revising draft SOO before final version is forwarded to Contracts for action.	19%	Green	
28	<b>CFO</b>	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>				

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		3/19/2004	The ABC proposals have been received and questions have been sent out to bidders. Barring unforeseen problems, award is anticipated by early April. Reconciliation between FSA's Status of Funds report, Statement of Net Cost, and ABC downloads is complete and differences have been categorized. Recommendations regarding final ABC data pulls have been prepared for CFO management discussion.	21%	Green	
		3/5/2004	The ABC SOO has been delivered to potential bidders; proposals are due by 3/8. Initial reconciliation between FSA's Status of Funds report, Statement of Net Cost, and ABC downloads is complete; differences are being categorized for the purpose of review.	20%	Green	
29	<b>CFO</b>	<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>				
		3/19/2004	Reconciliation Reengineering Project: Received one proposal in response to RFP. We rejected the proposal since it didn't address our needs. The SOO has been revised and sent to procurement to be reissued. Desk Operating Procedures: Deva delivered drafts of all 8 reconciliations by 3/5/04. Six of the eight have been reviewed by the team leads and have been submitted to management for review/approval. Other: Team lead meetings and reconciliation team meetings are held weekly. Even though process improvements have not been developed or implemented to increase the timeliness and effectiveness of existing reconciliations. Regardless, we accelerated the internal monthly due date by 1 week beginning with the January reconciliations. We met this new deadline (approximately the 22nd of the month) for about 80% of the reconciliations.	25%	Green	
		3/5/2004	Reconciliation Reengineering Project - FSA issued an RFP for a contractor to conduct a pilot reengineering effort that includes assessing the As-Is process and developing a To-Be improved process for a representative sample of the FMS to source program (DL, FFEL, and DCS) reconciliations. Proposals are due to FSA cob 3/4. FSA has scheduled a review and selection working session for 3/5.  Desk-Level Procedures - DEVA is drafting revised desk-level procedures based upon the agreed upon format documented by the FMS/FMSS procedure prototype. DEVA is on track to deliver all drafts by 3-5-04. FSA has 7 days to review and provide comments.	20%	Green	
30	<b>CFO</b>	<i>Manage FMS operations.</i>				
		3/19/2004	FMS Operations continues to operate smoothly.	47%	Green	
		3/5/2004	FMS Operations continues to operate smoothly. The February 2004 accounting period was closed in under 2 business days. Transactions continue to process in a timely manner. User requests are also addressed in a timely manner.	43%	Green	
31	<b>CIO</b>	<i>Develop and deploy Enterprise Performance Test Architecture.</i>				
		3/19/2004	Proposals Due 3/18.	20%	Green	
		3/5/2004	RFQ distributed. Proposals due 3/18.	20%	Green	
32	<b>CIO</b>	<i>Provide Enterprise and Data Architecture management.</i>				
		3/19/2004	No changes to report.	40%	Green	

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		3/5/2004	The EA team continues to actively manage the EA. In addition we are actively working on FEBI, SAIG, Data Strategy, and briefing GAO on our progress. The DA team is currently populating systems Architect with outputs from Data Strategy moving the FSA data architecture into Popkin. The team also is providing data warehouse and data architecture support to CSB and the Oracle 11i upgrade.	40%	Green	
		3/5/2004	The EA team continues to actively manage the EA. In addition we are actively working on FEBI, SAIG, Data Strategy, and briefing GAO on our progress.2/20/2004	40%	Green	
33	CIO	<i>Provide security and privacy support to FSA business units.</i>				
		3/19/2004	Completed eCB accreditation. This completes accreditation for all FSA systems. Worked with Department workgroups to "Eliminate IT Security as a Reportable Condition". Met with multiple systems for security support for Audit CAPS, Personnel Security Clearances, system identifications, and other items.	20%	Green	
		3/5/2004	Provided strawman documents to Departmental workgroups for Audit Resolution and Security Standards. Continued research and created draft training material for P3P.	15%	Green	
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>				
		3/19/2004	No changers to report	10%	Green	
		3/5/2004	ITA is supporting FAFSA configuration and performance issues. Performance testing of FAFSA production issues was halted while issues with CPS were investigated. Six new scripts will be run in a performance test after FAFSA peak. EAI coordinated system monitoring changes for Datamart, FMS, and EAI migrations. PPS assumed lead responsibility of EAI and ITA starting 2/16.	10%	Green	
			Currently ITA is testing Team Site 5.5.2, Open Deploy 5.6, and Data Deploy 5.6 on the new refresh servers, fsasvsmrd08 and fsasvsmrd09. The testing has brought out multiple problems with the product upgrade. Most of the problems have been addressed with OpenDeploy patches. The most serious issue not addressed yet is a session problem on the backup server. This problem has happened once before on the primary server and required a complete reinstallation of Team Site. We are currently working with Interwoven 2nd level to resolve this issue. Once this problem is resolved all teams will be asked to retest the deployment.			
			The ITA Team has deployed two new environments in the WebSphere 5.0 development area. These new environments are for the EzAudit application. One will be used for brand new development, while the other is used to mirror production so that any fixes needed can be introduced in a production like environment. Two new test environments are being developed to mirror the development area.			
35	CIO	<i>Support the FSA IT assets at the VDC with lines of service including, full and incremental backups, annual disaster recovery tests, disaster recovery location and services, quarterly capacity planning, annual penetration testing, test environment support, security, compliance to all appropriate FSA, ED, &amp; Federal policies, regulations, statutes.</i>				
		3/19/2004	Technology Refresh and EITS Report Portal: Continuing on schedule.	33%	Green	
		3/5/2004	Technology Refresh and EITS Report Portal: Continuing on schedule.	30%	Green	

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36	CIO	<i>Continue Enterprise Quality Assurance Program to support the FSA CIO in conducting systems assessments and evaluations consistent with best practices for Solution Life Cycle (SLC) and Capital Planning and Investment Control (CPIC) processes.</i>			
		3/19/2004	Transfer of Funds document (Amendment 09), accounting for CSB IV&V funding, FMS scope enhancements and the remaining QA Team operations funding for FY04, was sent to Glenn Perry's office and OGC for signatures on 03/17. QA Team is working on the draft of CSB IV&V Quality Assurance Surveillance Plan (QASP) to support CSB - SOW. Acquisition of IV&V support to EAI & ITA FY04 activities and Security Support to COD - SSO continued to be delayed at GSA/FEDSIM. FEDSIM contracting staff working to expedite tasks.	48%	Green
		3/12/2004	Transfer of funds document (Amendment 09) is in the review process with Glenn Perry's office and OGC (Jeff Morhardt). This amendment accounts for CSB IV&V funding, FMS scope enhancements and the remaining QA Team operations funding for FY04. GSA/FEDSIM is tracking their acquisition process to provide CSB IV&V support by 01 May as planned. Efforts to secure new IV&V support task for FY04 EAI & ITA deliverables is in process. QA / IV&V staff is reviewing the new EAI & ITA deliverables listing (received on 08 March) for impact on scope and level of effort.	45%	Green
		3/5/2004	Held discussions with Ben Leborgs (CSB IV&V Liaison) and Mike J. Murray (CSB - COR) regarding cost estimates for CSB IV&V support. They adjusted their initial funding intent and increased the FY04 funding to transfer to GSA/FEDSIM. QA Team is coordinating with Deb Wrabley to adjust the transfer document for processing. GSA/FEDSIM (Bob Padgett) is pursuing the intended Directed 8(a) contract approach to support CSB - IV&V needs. Target date for CSB IV&V award remains May 1. Security Analysis support to COD team SSO (Don Dorsey) is projected to be in place by March 17.	40%	Green
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>			
		3/19/2004	The eLoans team briefed Jonathan (Jack) Koller, OMB's new E-Gov G2C Portfolio Manager, on the eLoans initiative and the status of all four workstreams and on a possible transition/migration strategy. Jack noted that OMB appreciated the eLoans team's collaborative process. He also expressed interest in the upcoming April 29 GovLoans launch event. Students.gov received 46,063 visits (1.2 million hits) during the week of March 7 - 13, 2004.	48%	Green
		3/12/2004	The GovLoans team finalized the site's content for the first release on 04/29/04, and began planning for updates, improvements, and usability testing of the live site in May 2004 and beyond. The Department of Labor/GovBenefits team invited Secretary Paige to speak at the GovBenefits 2nd anniversary event, which is also the GovLoans launch event. Students.gov received 49,317 visits (1.2 million hits) during the week of February 29-March 6, 2004. As of March 8, 14,504 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	45%	Green
		3/5/2004	On March 1, the GovLoans team met with Ketchum Communications to begin development of an outreach plan for the GovLoans.gov web site. Ketchum made a brief presentation at the GovLoans working group meeting on March 3. In February 2004, 213,017 visitors came to students.gov, 221% higher than the number of visits in February 2003. As of March 1, 14,486 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	40%	Green
38	OMBD	<i>Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.</i>			

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		3/19/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.67 (through 03/12/04)	42%	Green	
		3/5/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.63 (through 02/27/04)	42%	Green	
41	CMS	<i>Plan and manage FSA conferences.</i>				
		3/19/2004	Requesting Target Date Change from March 04 to April 04. The Spring Conference and other events do not end until April 1st. It takes a couple of weeks to receive and analyze the evaluation data.	70%	Green	
		3/19/2004	-Fall 2003 EACs completed with high customer satisfaction rating. -Of the 32% of sessions scheduled for review for the Spring Conference, 26% were completed. Some presenters declined to have their sessions reviewed. -As of 3/17, there are 1,355 registered for the Spring Conference. -Will request a change of the target completion date from March 04 to April 04, since the Spring Conference and other events ends on April 1. Data won't be available until the end of April.	70%	Green	
42	CMS	<i>Manage, develop and update content for FSANet.</i>				
		3/19/2004	FSANet Web Trends from March 1 - 18th. Successful hits for the entire site = 226,156; Average hits per day = 7,295; Home page hits = 2,552; Visits = 5,081; Average visits per day = 163. The most active day was Wed., Mar. 3 from 2:00 p.m. to 2:59 p.m. The FSANet 5 top pages/sections were: Home Page, IT Security Portal, Career Zone, FSA Reorg Package and Search Tool. The most downloaded file on FSANet was the Modernization Task Orders & Deliverables.	45%	Green	
		3/5/2004	FSANet successful hits for entire site - Feb 04 = 264,576; Jan 04 = 339,654; Dec 03 = 242,237. FSANet average hits per day - Feb 04 = 9,123; Jan 04 = 10,038; Dec 03 = 7,814.	45%	Green	
43	CMS	<i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i>				
		3/19/2004	FOIA - Rec'd. 11 new requests in Feb. and closed out 3. Rec'd 6 new requests in March and closed out 12. CONTROLLED MAIL - Rec'd 218 new pieces of mail. YTD total is 1062. All responses are on time.	45%	Green	
		3/5/2004	Controlled Mail - For the last two weeks there have been 221 new pieces of mail. The YTD total is 844 pieces. All responses are on time.	45%	Green	
44	CMS	<i>Develop and implement internal and external communications strategy.</i>				

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		3/19/2004	<p>-VNR was completed and disseminated Mar. 9, 2004. Current tracking data: 152 airings; 104 stations; 77 markets; 5.9 million viewers!!!</p> <p>-Industry Awards: Nominated SAOTW for Exec.Gov's Gracie Award for technical and customer excellence; Nominated the FSAIC, CCSC &amp; Ombudsman's call centers for the Gov. Customer Support Award focused on customer service excellence.</p> <p>-Working with HR &amp; ED videographer on creating a new employee orientation (and other) video. Coordinating the FAAs and students to be filmed while at the Spring Conference. June is the target month for completion.</p> <p>-Lobby monitor reflects current (03/18) Dashboard data.</p> <p>-Greentree interviewed Keith Wilson re: Data Strategy. Look for it in the GG's May issue under "Tax Dollars At Work."</p> <p>-Entrance Counseling Guide for Direct Loan Borrowers is under editorial review in OPA. Should be printed in April.</p> <p>-Draft flow charts of the pubs process are being created.</p> <p>-28 information requests received in March and 13 have been answered.</p> <p>-Information Tracking Request file was completely updated on 3/18. Since tracking began in Dec. 03, there have been a total of 146 requests received and only 12 are open, 1 is on hold.</p> <p>-FSA Weekly News and the Secretary's Weekly News continues to be completely on time.</p>	45%	Green
		3/5/2004	<p>-Sec. Paige &amp; Terri were "filmed" for FSA's video news release that will air around the country with the purpose of promoting the FAFSA.</p> <p>-The newest issue of FSANow is out.</p> <p>-Lobby monitor updated weekly reflecting Dashboard data.</p> <p>-Greentree Gazette will interview Keith Wilson for their second article on "Tax Dollars at Work" about Data Strategy.</p> <p>-Work continues on publications process and defining what "process" each publication goes through, for example, going to OPA for review or not. The end goal is make this easier for employees by giving them the correct tools, such as the Department's Guide to Publishing and the AP Style Book for writing.</p> <p>-68 "requests for info" were received in Feb 04 and 33 responses were fulfilled.</p>	45%	Green
45	EPMS		<i>Mature Enterprise-wide Procurement Plan.</i>		
		3/19/2004	<p>One objective for finalizing the final draft of the Enterprise-Wide Procurement Plan (EWPP) is delayed pending the completion of SAIG and VDC market research. The SAIG market research is scheduled to be completed by the end of March, which leaves little time to incorporate the research results into the EWPP by April 1, 2004. While preliminary research has been accomplished, the main thrust of the VDC market research will not start until the end of April 2004. These two delays impact the ability to meet an internal objective of April 1, 2004. Therefore, the overall rating for project 45 is moved from Green to Yellow. ASI previously proposed in their project schedule a systems handover of the procurement planning database on March 30, 2004. A performance review of the progress completed to date indicates that ASI may not meet this deadline. The forecast of completing project number 45 overall objective is still achievable by the plan date of September 30, 2004.</p>	70%	Yellow

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		3/5/2004	The Enterprise-Wide Procurement Plan for FSA is in the final draft stage of development and should be completed by April 1, 2004. The final development and implementation of the plan is contingent upon the conclusion of the FEBI market research in March 04 and approval of the resulting procurement strategy. The plan will then be updated in March 04. Enterprise-Wide Procurement Planning Database is in the final engineering stage with a proto type scheduled for delivery on March 30, 2004. The database will be used to maintain the procurement plan and contract information. The database functionality is being expanded to include a procurement planning report for tracking and measuring procurement process across the enterprise.	70%	Green
46	EPMS	<i>Develop acquisition workforce.</i>			
		3/19/2004	The training plan for APCMG staff has been approved and training is being scheduled. The acquisition workforce includes APCMG, contracting officers on detail to FSA, and the program managers serviced by APCMG. By the end of March 04 the contracting officers will only be staffed at 20% of the workforce required to support contract award and administration at an acceptable level.	40%	Green
		3/5/2004	The acquisition workforce includes APCMG, contracting officers on detail to FSA, and the program managers serviced by APCMG. By the end of March 04 the contracting officers will only be staffed at 20% of the workforce required to support contract award and administration at an acceptable level. APCMG currently has two outstanding vacancies. One hiring action was completed in February 2004 and the new associate has a reporting date of March 22, 2004. Competency requirements and commensurate training activities have been identified for APCMG staff. Individual training plans have been developed and training starts in March 2004. ASI has delivered some project-specific training.	25%	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>			
		3/19/2004	The Enterprise Process is still being established. Contractor support has been engaged to identify the existing measures and processes being used on FSA contracts.	25%	Yellow
		3/5/2004	Person behind this initiative started work on Jan 12, 2004. Additional staff member selected and has a start date of March 22, 2004. Initiating Contractor support to help plan and develop the enterprise vendor performance process.	15%	Yellow
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			
		3/19/2004	While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data.	50%	Green
		3/5/2004	No Change from last report.	25%	Green
49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>			

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		3/19/2004	NSLDS and EAI/TTA awards to Small Businesses reflect a net increase in dollars awarded to small business, however no baseline exists to truly measure against. The extraction of permanent data from data sources is in process so baselines can be developed for measuring performance and solutions approaches derived from data analysis and process development.	40%	Green	
		3/5/2004	No change from last report.	40%	Green	
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>				
		3/19/2004	Working closely with the IPC to have all initiatives that have been approved with FY04 funding provide periodic project status reports at the IPC meetings. PMO scorecard template is being used. Rolling this out to all funded projects - once they report into the IPC, they will then continue to report into the PMO on a monthly basis. Three projects have reported into the IPC to date - 4 are scheduled for the next IPC meeting. Goal is to have at least 3 report each week.	20%	Green	
51	EPMS	<i>Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).</i>				
		3/19/2004	No updates since last meeting. Changed status to yellow as SLC project within FSA is on hold while we await the outcome of the ONE ED SLC project.	08%	Yellow	
52	EPMS	<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>				
		3/19/2004	Solicitation for new integration leader went out and proposals were due back by 3/9/04. Evaluation currently in process and target completion date is 4/15/04. Current integration task order with Accenture is being extended for 2 months (through May 04).	40%	Green	
53	EPMS	<i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i>				

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3/19/2004	General	All major initiatives supporting high-risk plan issues are on target. FSA staff and managers continued to meet with GAO on high-risk issue accomplishments and provide responses to their questions. A meeting held March 17 on systems integration was particularly successful, and the GAO lead indicated that FSA had answered all her questions and concerns.	46%	Green
	Financial Management	The IPC was briefed on a proposed initiative to provide government property management support. OIG's FISMA testing of COD is scheduled for March 29 and their testing of DLSS is completed. ED/OCFO has issued an RFP for recovery auditing and expects to award the contract by the end of April 2004. This initiative will meet an important legislative mandate.		
	Systems Integration	The academic year 2004-2005 COD functionality went live on schedule on March 15. The steering committee for Enterprise Analytics Architecture Options under Data Strategy 2.0 distributed a questionnaire across FSA to gather information related to the sources and timing of data needed for analysis. The results of the questionnaire will be used by the committee to formulate a draft architecture to support data analysis. The steering committee for Data Quality under Data Strategy 2.0 distributed a report on data quality issues for review and update. Feedback from that distribution will inform the committee's prioritization phase. OCIO completed certification and accreditation of all 17 FSA systems. The IPC was briefed on contract specialist support to help FSA stay on track with the large integration procurement initiatives underway.		
	Program Integrity	The eZ-Audit project status overall score is red, a worsening trend. A new proposed target date for a system support procurement has not been set, but an independent contractor has been identified to help improve the business process and meet the critical operation dates. Initiative to provide monthly monitoring of GA and lender reasonability through NSLDS remains in red status. A point person from the Portfolio Risk Management Group has been assigned to coordinate the efforts of the Default Management Work Group. ASEDS management reviewed 18 potential compliance risk areas that were identified through data analysis and selected 7 on which to focus. Default recoveries through March 5 on non-consolidation loans were 35% of the same period last year.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/6/2004	<p>General - FSA staff and managers are continuing to meet with GAO on accomplishments and plans that address the issues raised in the designation of the SFA programs as high risk and the FSA's progress in operating as a PBO and addressing the goals and requirements of the PBO legislation.</p> <p>Financial Management - FSA continues to be on track on its financial management and internal control improvement projects. Most notably on March 3, the Department met with the auditors to kick off the FY 2004 audit. Discussed were the FY 04 government-wide closing package; accelerating the reporting date to November 1; prepared-by-client (PBO) documentation improvements; and other matters, such as guaranty agency site visits.</p> <p>Systems Integration - Major projects continue on track; on March 3 the Investment Planning Council was briefed on the status of Commons Services for Borrowers (CSB), Data Strategy and Trading Partner Management. Also, the initial Data Quality Steering Committee meeting was held on February 27, and follow-up meetings for the Data Quality Management efforts have been scheduled. In addition, a Lender Payment Processing Requirements Gathering Session and Data Strategy Functional Gap Kick-off meeting was held 2/23/04.</p> <p>Program Integrity - The FY 2003 NSLDS Annual Data Quality Report was released, again demonstrating that data accuracy in NSLDS continued to improve. ASEDS is progressing in its efforts to assess overall compliance trends and identifying areas for review and training. Meetings were held March 3 &amp; 4 to map make improvements in the eZAudit process and operations. Non-consolidation default recoveries continue to be ahead of last year's recoveries. However, this area continues to be the area that needs the greatest management attention. In addition to items raised during the last reporting period, FSA needs to assure that it is able to provide monitoring functionality for GA and lender monitoring; more timely perform and report to Congress on VFA cost neutrality analysis; clearly demonstrate that it is providing effective oversight to schools.</p> <p>PBO Management - A contractor (Partnership for Public Service) is on board and a project plan was finalized to assure that FSA meets its goal of updating its Human Capital Management Plan by July 1. Also FSA's FY 2004 Annual Performance Plan was updated to include this important action. FSA's updated draft FY 2004-2008 Five Year Plan was provided to the Department for comments.</p>	40%	Green
54	AWSS		<i>Deliver workforce development and support programs.</i>		
		3/18/2004	We are continuing to provide services and support programs to the FSA workforce.	50%	Green
		3/5/2004	We are continuing to provide services and support programs to the FSA workforce.	50%	Green
55	AWSS		<i>Perform facilities management activities.</i>		
		3/18/2004	We are continuing to work on records management and transit and parking issues to improve the working environment of FSA employees.	70%	Green
		3/5/2004	We are constantly working on space, security, facility, records management, and transit and parking issues to improve the working environment of FSA employees.	70%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
56	CFO		<i>Review Credit Reform estimates.</i>		
		3/19/2004	FSA/CFO worked with Budget Service, OCFO, and OPE to edit and comment on initial draft deliverables. Bidders submitted proposals to provide technical assistance in this effort, and FSA is working with Contracts to negotiate an agreement.	10%	Green
		3/5/2004	FSA/CFO continues to work with Budget Service, OCFO, and OPE to implement the project plans of the four Credit Reform Work Group subgroups. Analytical Tools; Assumptions; Business Process; and Outside Agencies Review. Bidders are due to submit proposals to provide technical assistance in this effort by cob March 4.	09%	Green
57	CFO		<i>Develop trial balance capability for COD and CSB (operating partners) to facilitate and expedite the reconciliation process.</i>		
		3/19/2004	It has been determined that COD's Student Account Statement (SAS) to COD's Database reconciliation will be used as the Trial Balance. This initiative will be a part of COD's requirements to correct the SAS. In addition, a Trial Balance has been developed for Direct Loan Servicing (DLSS) and is a requirement under the CSB contract. Thus, action item #57 is either being addressed by the Application & Delivery Services area or by the Borrower Services area. As a result of these actions, there are no outstanding requirements of this project. This project may now be closed.	100	Green
		3/5/2004	The Accounting Division has developed a methodology for developing trial balance capability with COD-TSYS and has drafted procedures. Once management approves the proposed methodology and the draft procedures, this task will resume with weekly working group sessions with the program area and TSYS. The development of trial balance capability for CSB is in the requirements gathering stage.	10%	Green
58	CFO		<i>Support the implementation of Oracle Federal Financials Release 11i.</i>		
		3/19/2004	FSA CFO continues to complete tasks detailed on the short-term action plan. This short-term action plan includes the following: <ul style="list-style-type: none"> <li>· The EDS proposal is being approved by Contracts and will be awarded upon the CFO's approval of the skill mix.</li> <li>· Oracle 11i JAD session have begun with each of the business/operating partners. JAD sessions have been conducted with the following FSA groups: LEAP/SLEAP, Lender, GA, CFO, CSB, CIO. Meeting notes have been produced and distributed.</li> <li>· The Oracle 11i project plans has been updated to reflect changes such as: SOO award date, final as-is system and business process flow due dates, JAD session dates, and final critical data element recommendation due dates.</li> </ul>	39%	Green
		3/5/2004	FSA CFO continues to complete tasks detailed on the short-term plan. This short-term action plan includes the following: <ol style="list-style-type: none"> <li>1. The EDS proposal is being approved by Contracts. Upon final approval, the contractors are prepared to immediately begin the task.</li> <li>2. The FSA CFO led the first Oracle 11i overview meeting. The first of the Oracle 11i JAD sessions have been scheduled for next week with each of the business/operating partners.</li> <li>3. The OCFO and FSA Oracle 11i project plans have been consolidated into one document and will be maintained on a shared drive.</li> <li>4. FSA system flows, business process flows, and draft recommendations for improvement have been delivered to FSA in draft form to be used as read-ahead material for the JAD sessions. These documents will be finalized upon the conclusion of the JAD sessions.</li> </ol>	35%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
59	<b>CFO</b>	<i>Implement automated budget funding entry solution.</i>			
		3/19/2004	Continuing to work with contracting officers to finalize awards with EDCAPS contractor (IBM) and FMS contractor (EDS).	21%	Green
		3/5/2004	Proposals from both EDCAPS and FMS contractors have been received and approved. Final award is anticipated within the next few weeks.	20%	Green
60	<b>CFO</b>	<i>Implement Forms 2000 additional enhancements.</i>			
		3/19/2004	The Form 2000 Enhancements Pre-Production Readiness Review and Form 2000 Enhancements Production Readiness Review were held. The deliverable was signed off by the Director of FMS.	85%	Green
		3/5/2004	The implementation of the Form 2000 additional enhancements initiative continues to be on-schedule and on-budget. The initiative is currently in the user acceptance testing phase; production readiness review is due later this month (March 2004). If the task continues to stay on schedule, it will be complete as planned in April 2004.	80%	Green
			The Accounting Division staff have completed the test scripts that were provided during user acceptance testing. In addition, we are currently testing independently and documenting any problems. No major problems have been encountered so far.		
61	<b>CIO</b>	<i>Implement Enterprise Data Strategy initiatives.</i>			
		3/5/2004	Completed and submitted Target Vision Functional Gap Analysis 152.1.3a and Target Vision Enterprise Analytics Architecture Options Analysis 152.1.4a deliverables. Continued holding working sessions with FSA SMEs for CSB Impact Analysis. Please Note Due Date Change to reflect final due date of final deliverable within this task, rather than due date of first deliverable in this task. 2/20/2004 - Held sub team kick-offs/initial working sessions for each of the sub teams. Worked on drafts of deliverables due 2/29 (Target Vision Functional Gaps Analysis- DRAFT, and Target Vision Enterprise Analytics Architecture Options Analysis - DRAFT). Held working sessions to review drafts of deliverables.	15%	Green
62	<b>BS</b>	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>			
		3/19/2004	Progress reports for this item is included in the milestones.	25%	Green
		3/4/2004	See milestone updates.	22%	Green
63	<b>ADS</b>	<i>Improve school partner oversight.</i>			
		3/19/2004	Continued progress on all remaining milestones. See 63.1, 63.2, 63.6, and 63.8 for details.	47%	Green
		3/5/2004	Progress continues to be made on remaining four milestones (63.1, 63.2, 63.6, and 63.8).	43%	Green
65	<b>ADS</b>	<i>Create a target state vision of a Front End Business Integration (FEBI).</i>			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>	
		<i>Status Date</i>	<i>Comments</i>			
		3/19/2004	FEBI Statement of Objectives (SOO) workgroup refined the SOO document, incorporating feedback from the FEBI Core Team and Kay Jacks. Source Selection team tentatively identified, team selection to be discussed with COO prior to official selection; Completion of RFP Package & SOO by March 19th.	45%	Green	
		3/5/2004	Feb 19 - Briefed FSA Management Council on project status, key decisions and next steps; Feb27 - Draft SOO completed, will be posted to FEBI website for review and comment from the vendor; Feb 16 - Feb 27 - Defined FEBI outcomes and continued to refine front end vision based on Enterprise objectives around Data Strategy.	40%	Green	
66	FPS	<i>Re-engineer NSLDS (Pending Data Strategy Outcome).</i>				
		3/19/2004	This project cannot begin as it is dependent upon the outcome of the data strategy project. FP will begin reporting on this project once the data strategy is determined.	00%	Green	
		3/5/2004	No status will be given on this project at this time. This project cannot begin, as it is dependent upon the outcome of the data strategy project.	00%	Green	
67	ADS	<i>Prepare to implement IRS data match.</i>				
		3/19/2004	The IRS Workgroup has identified six key steps in implementing an IRS match and developed five possible implementation approaches. The workgroup is currently in the process of developing a PowerPoint presentation that outlines the six steps and flows for each of the possible approaches. The workgroup plans to present this information to the Management Council some time after the Spring Conference in New York City.	70%	Green	
			In addition, members of the workgroup are presenting an IRS Match general session at the Spring Conference. On Friday, March 17, 2004, members of the workgroup will provide a preview of this presentation to the Management Council.			
		3/5/2004	A business case has been drafted for presentation to the DSG on March 12th. The business case outlines our proposal to send a letter or email to all students who have had their application processed by April 15th. The letter will tell students and their parents to check the AGI on their tax returns against the AGI they submitted on the FAFSA and to make corrections to their FAFSA if necessary. Families self-correcting their income data will take the burden off FAAs while improving the accuracy of the FAFSA data.	65%	Green	
68	AWSS	<i>Continue Learning Coupon program.</i>				
		3/18/2004	As of 3/17/04, 96 coupons have been used and \$38,138 has been obligated. The rollout of the online database is delayed at the VDC.	20%	Green	
		3/5/2004	88 coupons have been processed and \$35,719 has been obligated as of 3/3/04. Still waiting to go live with the new online database.	20%	Green	
69	AWSS	<i>Provide Career Zone services.</i>				

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		3/22/2004	The Career Zone continues to provide Career Management workshops every Tuesday and Thursday. The career counselors are meeting with staff to provide one-on-one individual career counseling sessions. The book Club has started and has received very positive feedback from staff. For the month of March, the Career Zone has offered a 3 day Retirement Workshop in DC, 6 career management workshops, a CPR class, the Book Club and will offer 2 new workshops, Skill Scan and Campus Base-Title IV.	75%	Green
		3/5/2004	The Career Zone continues to provide Career Management workshops and one-on-one counseling to FSA staff. Staff are generally pleased with CZ Career Management and counseling services. In March, the CZ will offer two new workshops. The first is a Book Group that will provide staff an opportunity to read and debrief a book on many interesting topics including Leadership, coaching, mentoring, and change management. The second workshop, Skill Scan, will allow staff the ability to inventory their skills to increase marketability. Additionally, the Career Zone will offer a second CPR class on March 10 and a Retirement workshop on March 16-18.	75%	Green
70	ADS		<i>Increase Student Financial Aid program awareness.</i>		
		3/19/2004	All supporting projects are progressing on schedule.	20%	Green
		3/5/2004	All supporting projects are progressing on schedule.	15%	Green
71	ADS		<i>Reengineer EDEExpress.</i>		
		3/19/2004	Acceptance testing for Return to Title IV Funds began on March 15, 2004. While testing is on schedule, we are in the process of completing a System of Records Notice (SORN) that will postpone the release of the software to the Web until late June or early July. The PRR for Return to Title IV on the Web was tentatively scheduled for late March or early April with the software being pushed to the web site by mid-April. The software (PRR) should be on schedule. The actual posting will be delayed.	90%	Yellow
		3/5/2004	Acceptance testing is scheduled to begin on March 15, 2004. The PRR for Return to Title IV on the Web is tentatively scheduled for late March or early April with the software being pushed to the web site by mid-April.	90%	Green
73	CIO		<i>Develop FSA Security and Privacy Architecture Pilot.</i>		
		3/19/2004	Met with VDC support staff to discuss security tool's pilot requirements. Met with Data Strategy support team to align the direction of security architecture to FSA future state. Briefed Jerry Schubert on next steps.	48%	Green
		3/5/2004	Briefed FSA System Security Officers and new ED/OCIO IA Director on analysis and steps for prototype implementation.	40%	Green
74	AWSS		<i>Implement Leadership Excellence development training.</i>		
		3/18/2004	The Leadership Advisory Group (LEAG) has formed and met 8 times. We have developed a strategy for manager/leader development at FSA that can be integrated into our Human Capital Plan. It includes the concept and rules for the Leadership Fund. We are presenting the strategy to the Management Council for approval on March 19. We are also seeking to procure a workshop in May on a 360 assessment tool.	10%	Yellow

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
<i>Status</i>	<i>Date</i>	<i>Comments</i>		
	3/5/2004	The Leadership Excellence Advisory Group (LEAG) has now met 5 times. We are currently working on a manager/leader development strategy that can be integrated into our Human Capital Plan. We will be presenting the concept and rules for the Leadership Fund to the Management Council for approval on March 12.	10%	Yellow

# FSA Milestone Status Report

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
1	ADS	Implement student aid awareness initiatives.						
		1.1	Leverage partnership activities to disseminate FSA information.					
				3/19/2004	SAA participated in 7 continuing partnership activities - March 2 provided the Funding Your Graduate Education fact sheet for distribution at the Oklahoma State University Tulsa graduate studies fair as part of the outreach to Native Americans. March 5 & 6 discussed federal student aid during the panel session on "Preparation for Postsecondary Education as part of the 4th Feria Educativa sponsored by the National Partnership for Hispanic Education held at the University of Arizona in Tucson. March 10, as part of the HUD Regional Technical Assistance Workshops' "Federal Resources" panel, encouraged HUD Neighborhood Network Centers (community-based programs that support the development of community technology centers in privately owned HUD insured and assisted housing) to disseminate student financial aid information to community residents. NACAC and NSS College Fairs - March 13, 2004, Chicago, IL March 14-15, 2004 - Springfield, MA March 16, 2004 - Newark, NJ March 18, 2004 - Philadelphia, PA	100%	Complete	
					2 new outreach activities - SAA coordinated FSA regional participation in the Second Annual East Palo Alto College Fair on Saturday, March 6. The event was a joint initiative between the City of East Palo Alto, Foundation for a College Education (FCE), Realizing Intellect Through Self-Empowerment (RISE), College Track, the Boys & Girls Club of the Peninsula, Sequoia Union High School District - Target Success Program, New Perspectives, Ravenswood City School District and Bayshore Christian Ministries. March 10 - conducted an overview of Federal Student Aid and the FSA Websites to 23 OPE employees assigned to the TRIO Program and GEAR-UP offices.			
				3/5/2004	SAA participated in four continuing partnership activities - February 23 conducted a workshop, Federal Student Aid: Programs and Services to Connect Students to College, for TRIO professionals as part of the Ninth Annual Conference of the DC Consolidation of Educational Services. Feb. 24 distributed financial aid information at the annual Native Women Supporting Each Other Luncheon, which was part of the National Congress of American Indians convention. Feb. 25 facilitated a meeting between two of its partners, the National Council for Community and Education Partnerships (NCCEP) and the U.S. Department of Housing and Urban Development 's Neighborhood Networks, to promote networking among organizations that support expanding educational opportunities for low-income students. This expanded partnership will enhance SAA ability to disseminate financial aid information to those most in need of the information. Feb. 29 participated in the National Association for College Admission Counseling (NACAC) College Fair in Tampa, FL.	100%	Complete	
			1.2	Publish accurate and timely information that meets the needs of our audience.				
				3/19/2004	Continuing work on the development schedule for the 2005-06 versions of our publications (including The Student Guide, Funding Your Education, and the High School Counselor's Handbook. The schedule will depend on the results of usability studies that we are preparing to conduct.	07 %	Green	

3/5/2004 Continuing work on the development schedule for the 2005-06 versions of our publications (including The Student Guide, Funding Your Education, and the High School Counselor's Handbook. The schedule will depend on the results of usability studies that we are preparing to conduct. 06 % Green

1.3 Disseminate information directly to target audience.

3/19/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 3/19/04, SAA has provided federal student aid information and distributed materials to approximately 56,044 persons as follows: 53 % Green

March 6, 2004	East Palo Alto College Fair	125
March 9, 2004	OPE TRIO & GEAR-UP training	23
March 10, 2004	HUD NN TA Workshop	100
March 13, 2004	Chicago College Fair	200
March 14-15, 2004	Springfield, MA College Fair	300
March 16, 2004	Newark, NJ College Fair	500
March 18, 2004	Philadelphia, PA College Fair	1,000
Not reported during previous reporting period		
March 2, 2004	Tulsa Career College Fair	100
March 5-6, 2004	Partnership for Hispanic Education	400

3/5/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 3/06/04, SAA has provided federal student aid information and distributed materials to approximately 53,296 persons. 50 % Green

1.4 Respond accurately and timely to requests.

3/19/2004 For the period 3/1/04 –3/12/04, the Editorial Services Contract responded to the following correspondence:56 controls--- (106 prior period)-----turnaround (3 days)=100% 2,839 non-controls--- (1,816 prior period) —turnaround (2 days)=9%2,090 e-mails--- (2,504 prior period)-----turnaround (2 days)=100% 70 % Green

3/5/2004 For the period 2/16/04 – 2/27/04, the Editorial Services Contract responded to the following correspondence:106 controls--- (22 prior period)-----turnaround (days)=100% 1,816 non-controls---(691 prior period) —turnaround (days)=62%2,504 e-mails--- (1370 prior period)-----turnaround (days)=70% 99 % Green

1.5 Reach customers through Student Aid on the Web.

3/19/2004 Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (02-29- to 03-13-04) are 951,115 and 15,282,906 respectively. During the same period last fiscal year we had 242,100 visits and 8,276,371 hits. This represents FY04 increases of 292.8% for visits and 84.7% for hits over FY03. MyFSA, the Student Aid on the Web feature that offers students and their families a single source of free information on choosing a career, selecting a college and identifying resources to pay for higher education, has recorded 24,994 new accounts for the FY04 year to date. The MyFSA feature was not available last fiscal year. 100% Complete

3/5/2004 Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (02-15- to 02-28-04) are 824,256 and 13,846,574 respectively. During the same period last fiscal year we had 233,052 visits and 7,773,755 hits. This represents FY04 increases of 253.7% for visits and 78.1% for hits over FY03. MyFSA, the Student Aid on the Web feature that offers students and their families a single source of free information on choosing a career, selecting a college and identifying resources to pay for higher education, has recorded 23,094 new accounts for the FY04 year to date. The MyFSA feature was not available last fiscal year. 100% Complete

2 ADS Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).

2.1 Monitor customer feedback to improve services.

3/19/2004 CSCC continue to make progress in 3 areas identified for improvement: 47 % Green

(1) Promoting IFAP Subscription Service -- There was a 2% increase in subscriptions from January 2004 to February 2004. Actual subscriptions increased from 4,420 to 4,517.

(2) Assisting the EZ Audit Staff -- We have completed our work with ED CIO to update our Lotus Notes software. Cross-training for CSCC and EZ Audit staff continues.

(3) A new IFAP search engine -- We expect that the new Google search engine will be available by summer 2004.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					3/5/2004	<p>CSCC continues to make progress in 3 areas identified for improvement:</p> <p>(1) Promoting the IFAP subscription service -- We have added a link on the IFAP home page to this mailing list this week, in order to give it greater visibility in efforts to increase our membership (we will have our new volume as the end of February by the next report.)</p> <p>(2) Assisting the EZ Audit staff -- We are working with ED OCIO to get our Lotus Notes software updated. Since no money is involved for this enhancement, we have FSA approval to proceed and hope to get final ED OCIO approval quickly. Cross training for CSCC and EZ audit staff is on-going.</p> <p>The Lotus Notes training for the EZ Audit staff is still on hold until we receive ED OCIO approval to put the new enhancements into production. Some CSCC staff, however, have attended training given by EZ Audit staff in anticipation of their forwarding 'overflow' calls to CSCC.</p> <p>(3) A new IFAP search engine - We were notified that the new Google search engine will not go live by the Spring Conference, as the technicians were having difficulty installing it properly to the appropriate servers. Because of these installation difficulties, we have decided to delay the installation until after the spring conference. It will, however, be in production before the end of the fiscal year.</p>	43 %	Green
4	ADS	<i>Provide EDEExpress application modules.</i>						
		4.2	Release Common Origination & Disbursement module.					
					3/19/2004	<p>FSA Acceptance Testing on the Pell and Direct Loan module has been extended to add three new requirements, fix two issues and is scheduled for completion on March 19th. Based on COD web, EDEExpress needed to make some changes to correctly identify the student based on Original SSN as EDEExpress understands it by utilizing a cross-reference field; needed to give schools the ability to delete a record accidentally added during the Pell Year to Date rebuild process; and needed to add "Action Date" to DL web responses. A Packaging CM will be fixed as well as another issue identified during acceptance testing. The PRR is scheduled for March 31st. PLEASE NOTE: Because of the addition of these new requirements the software will actually not be posted to FSA download until the first week of April. This means that the Performance Objective of: Have EDEExpress Pell and DL modules for 2004-05 processing cycle available for user download by March 31, 2004 will be missed by approximately one week. However, this does not adversely impact schools, as they will not have begun 2004-2005 processing</p>	96 %	Yellow
					3/5/2004	<p>FSA acceptance testing on the Pell and Direct Loan module has been extended to add three new requirements, fix two issues and scheduled for completion on March 19th. Based on COD web, EDEExpress needed to make some changes to correctly identify the student based on Original SSN as EDEExpress understands it by utilizing a cross-reference field; needed to give schools the ability to delete a record accidentally added during the Pell Year to Date rebuild process; and needed to add "Action Date" to DL web responses. A Packaging CM will be fixed as well as another issue identified during acceptance testing. The PRR is scheduled for March 31st.</p>	98 %	Green
5	ADS	<i>Process Pell and Direct Loan transactions through the Common Origination &amp; Disbursement (COD) system.</i>						
		5.1	Issue COD software release.					

3/19/2004 PRR was held on 3/10/2004, and implementation of new functionality took place 3/12/2004-3/14/2004. Implementation was successfully completed, and COD System was ready to process 2004-2005 records on 3/15/2004. 100% Complete

3/5/2004 Continue on schedule to be ready to process 2004-2005 records on 3/15/2004. Production Readiness Review (PRR) scheduled for 3/10/2004. 86 % Green

5.2 Issue COD SOO.

3/19/2004 RFI comments were received on 3/8/2004. Final RFP is on schedule for release on 3/31/2004. 62 % Green

3/5/2004 Draft FEBI SOO was released to vendors on 2/27/2004. 57 % Green

6 ADS Administer Campus-Based (eCB) activities.

6.1 Prepare list of schools that do not submit FISAP by 10/01/2003 deadline and call schools to ensure compliance prior to tentative award notification.

3/5/2004 This milestone was completed on 1/16/2004. 100% Complete

6.2 Notify schools of tentative awards.

3/5/2004 This milestone was completed on 1/20/2004. 100% Complete

6.3 Call remaining schools that have not submitted their FISAPs and schools that need to correct their FISAP submissions prior to required closure of database on 3/15/2004.

3/19/2004 All calls were completed by 3/15/2004. 100% Complete

3/5/2004 Calls are ongoing and on track for completion by the 3/15/2004 database closure. 86 % Green

6.4 Issue final awards to schools.

3/19/2004 On track to issue final awards on 3/23/2004. 80 % Green

3/5/2004 Process continues and is on track for issuance of final awards by 4/1/2004. 74 % Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
			6.5	Issue FISAP software release.				
					3/19/2004	Testing of new software continues on track for release by 6/30/2004.	62 %	Green
					3/5/2004	Testing continues. On track to release software by 6/30/2004.	57 %	Green
7	ADS	<i>Upgrade Postsecondary Education Participation System (PEPS).</i>						
			7.2	Upgrade the Windows NT server that houses the E-App (the school eligibility web interface).				
					3/5/2004	The upgrade to the Windows NT server that houses the E-App (the school eligibility interface) was completed on 2/28/2004.	100%	Complete
8	ADS	<i>Expand eZAudit initiative.</i>						
			8.1	Commence Contract Start-up.				
					3/19/2004	Change milestone to be ready for contract award by Oct 1. Actual award before Oct 1 will be contingent on availability of 04 funding.	50 %	Green
					3/5/2004	IPC approved business case for Task Order 116 Mod 5 on 2-24. Kay approved revised completion date of 9-30-04. The goal is to have a new operating partner on board by Oct 1. As a contingency, FSA could exercise 2 option periods in the current contract.	50 %	Green
			8.2	Complete first full cycle of processing (all school types).				
					3/19/2004	45% of audits rec'd between 4/1/03 and present have been successfully processed.	45 %	Green
					3/5/2004	40% of all audits & financial statements received have been successfully processed.	40 %	Green
			8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.				
					3/19/2004	As of March 14, 2004, 2517 schools have registered.	10 %	Green

3/5/2004 10% of schools who were due to submit reports from June 16, 2003 - present have submitted. 2/3 of the population (not-for-profit and public institutions) are not due until March 31, 2004. 10 % Green  
 As of March 5, 2004, 2460 schools have registered.

9 ADS Enhance program monitoring and oversight.

9.1 Meet or exceed audit resolution rate of 95% by the end of the fiscal year.

3/19/2004 For the biweekly period 3-1-04 to 3-14-04, 76% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. The decrease was due to a recent policy position from OGC on processing paper audits. After eZ-Audit went live, FSA had received a backlog of paper audits and was striving to get all schools to submit their audits through eZ-Audit as the current regulation requires. FSA had over an 80 percent success rate working with schools on the first backlog to get them to use eZ-Audit. FSA was working on pushing the second backlog of paper audits through eZ-Audit when OGC stated that FSA could not reject paper audits from any institution if that is all they choose to submit, even if eZ-Audit is a regulatory requirement. With that decision, FSA started processing the backlog of paper audits that had been received months earlier. As such, the Case Teams did not start their resolution process in many instances until 120-180 days after receipt, which is now showing up as late audits. However, the cumulative resolution process itself is still within an acceptable timeframe. 45 % Yellow  
 We are working diligently to stabilize and increase the efficiency of eZaudit.

3/5/2004 For the biweekly period 2-16-04 to 2-29-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 97% of the audits were resolved on time. 42 % Green

9.2 Continue to measure school monitoring to assess overall compliance trends.

3/19/2004 Compliance measures for 2nd qtr not due yet. Mtg held with Kay Jacks on 3-4-04. Reviewed 18 risk areas, and selected 7 potential risk areas to focus on. Will proceed with plans for training and rollout to the Teams. 30 % Green

3/5/2004 Compliance measures for 2nd qtr not due yet. In addition, we have identified six potential areas of non-compliance, and several other potential areas, that will be reviewed with Kay Jacks on March 4. After approval of a final list of compliance areas, we will establish a workgroup, and prepare training for case teams similar to the verification review training done last year. The Administrative Actions & Appeals Division has received 21 referrals for administrative action from 10-01-03 through 2-29-04. 25 % Green

9.3 Conduct School Relations initiatives.

3/18/2004 The projects of the Account Managers are always ongoing. Our focus with our schools have not changed. We will continue to work with them as usual. 50 % Green

Work jointly with Borrower Services ib project 13 to identify new opportunities with default prevention. Mark Walsh is representing SRB on the Default Management Strategies Work Group that us currently being headed by Borrower Services and continues to assist Borrower Services by providing documentation for default activities for submissions to GAO.

Continue to address the large volume Perkins Loans and identify new, or enhance current delinquency/default prevention tools for the Direct Loan Program. Late Stage Delinquency Assistance has been developed and is in use with Perkins and Direct Loans. The EAC's attendees has been sent the User's Guide.

In accordance with our business plan, we will work with 100% of the schools that have unreturned Perkins Loan excess cash. We are continuing to work with Campus Based Operations on unreturned Perkins Loan excess cash.

Work with 100% of the HBCUs, HSIs, and Tribal Colleges that have a default rate above 15%. There are a total of 19 schools in this category. We have worked with HBCUs, HSIs and Tribal Colleges for quite some time. We will continue to work diligently with them to lower their default rates. At the EAC's we held Focus Groups and "Birds of a Feather" sessions. This is an ongoing process for us.

Work with schools to make sure they are in compliance with all Federal Regulations. We will continue to work with schools on their compliance of Federal Regulations by doing Technical Assistance visits.

3/4/2004 All of these issues are ongoing so the percentage won't reflect it's actual status. 12 % Green

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Work with schools to make sure they are in compliance with all Federal Regulations. We will continue to work with schools on their compliance of Federal Regulations by doing Technical Assistance visits.

9.4 Conduct the Experimental Sites initiative.

3/17/2004 The number of 2002-03 annual reports received has increased has increased to: 110 received (92%). Ten (10) extensions (8%) 60 % Green

3/3/2004 FSA released the third version of the annual report online tool that allows the Experimental Sites team to reset passwords, unlock reports, add/delete users, and review various reports. The reports were due on February 29th. A compilation of report submission shows: 100 (83%) submitted; 18 (15%) extensions; and 2(2%) uncollected 60 % Green

9.5 Administer the Quality Assurance program.

3/17/2004 ASEDS accepted the Phase 2 requirements for the ISIR Analysis Tool, and Pearson Government Solutions finalized them on March 8, 2004. QA staff are reviewing testing plans and help text documentation for Phase 1 of the ISIR Analysis Tool. All activities for both Phase 1 and Phase 2 remain on schedule. 60 % Green

3/3/2004 Phase 2 requirements of the ISIR Analysis Tool have been accepted and will be finalized by March 8, 2004. 55 % Green

9.6 Conduct vulnerability assessment.

3/19/2004 List of potential vulnerability areas continues to be reviewed/refined. Formation of teams to study targeted areas is underway and on track for May 2004 kick off. Research into long-term ownership of vulnerability assessment initiatives has begun. 15 % Green

3/5/2004 Strategy meeting was held on 2/27/2004. Full list of potential vulnerability areas has been drafted and will be reviewed/refined. Plan to study potential vulnerability with student identification/authentication, FAA identification/authentication, and school eligibility. Teams will be formed to study each target area and create action plans. Kick off for studies will be May 2004 after initial phases of FEBI and other integration strategy initiatives have been completed. Also looking into long-term ownership of vulnerability assessment initiatives. 10 % Green

10 ADS Produce school publications and materials.

10.1 Annually update and disseminate the Federal Student Aid Handbook.

3/18/2004 Both the Application / Verification Guide and the School Eligibility and Operations volume are now on the Web, and we have been working with GPO today regarding the print editions. Volume 5 and part of Volume 3 still have not been sent for review, but the rest of the Handbook has. 60 % Green

3/4/2004 The Application / Verification and the School Eligibility / Operations volumes are being sent for Web posting and to begin the printing process today. Two of the other five volumes are out for review. The remaining three volumes will be sent for review within a week or, in the case of volume 5, within a few weeks. Development is nearly complete save for Volume 5. 50 % Green

10.2 Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.

3/19/2004	<p>The Direct Loan Exit Counseling Guide print job has been awarded to Gateway Press in Louisville, KY. The first shipment of guides is due on 3/25/2004 and the second on 3/31/2004. An additional shipment of 375,000 copies was added and will be ready on 4/16/2004. We plan to release a bulletin announcing the availability of the materials by 3/24/2004.</p> <p>The Entrance Counseling Guide has been reviewed by OPA, and a meeting was held on 3/17/2004 to go review OPA's comments. Revisions need to be made and approved before going to print.</p> <p>The DL Basics and DL PLUS Basics brochures are being revised.</p> <p>There are only two back-ordered requests for publications or documents at the warehouse, and they are for the DL PLUS Basics brochure.</p>	47 %	Green
3/5/2004	<p>The Direct Loan Exit Counseling Guide is now at GPO to be printed. The first shipment is to arrive at the EDS warehouse on 3/25/2004 with the rest to be delivered on 3/31/2004. 500 copies will be available at the Spring Conference (3/29/2004).</p> <p>The Entrance Counseling Guide is still being proofread/edited. It is expected to go to OPA by 3/12/2004. Approval and printing should follow shortly after it goes to OPA. Expect to have these guide available to schools by mid-April.</p> <p>The DL Basics and DL PLUS Basics brochures are being revised. They are in the preliminary stages of design.</p> <p>There continue to be no outstanding or back-ordered requests for publications or documents at the warehouse.</p>	43 %	Green

13 BS Enhance program monitoring and oversight.

13.1 Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.

3/19/2004	Total non-consolidation loan recoveries were \$605.3 million thru March 5, 2004. This is an increase of 35 percent over the same period last year and 3.58 percent of the FY 2004 portfolio balance.	45 %	Green
3/4/2004	Total non-consolidation Default Recoveries through February, 2004 was \$ 558.6 million, an increase of 37 percent over the same period, last year February 2003. This represents 3.51 percent of the FY04 portfolio balance.	33 %	Green

13.2 Update FSA-wide risk management and default prevention inventory.

3/19/2004	A "point person" from the Portfolio Risk Management Group has been assigned to coordinate the efforts of the Default Management Work Group. Due to conference commitments the default prevention meeting will not be held until April.	15 %	Green
3/4/2004	The FSA-wide risk management and default prevention meeting has not been rescheduled as yet because of significant focus on CSB and required training of Portfolio Risk Management staff on Micro Strategies. A "point person" from the Portfolio Risk Management Group will be identified to coordinate the efforts of the Default Management Work Group.	05 %	Green

13.3 Complete the work on the implementation of the life-time default rate measure.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					3/19/2004	The Risk Management Group is analyzing the data extracted from the Credit Management Data Mart (CMDM) related to Direct Loan Servicing and Debt Collection Services (DCS) to clarify inconsistencies in the data.	25 %	Green
					3/4/2004	Reports have been run to eliminate consolidated loans from the analysis. Non-consolidated loans in the Direct Loan portfolio are being reviewed for the period 1994-1998. Use of the OPB at the time of default was selected as the parameter.	25 %	Green
			13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.				
					3/19/2004	The success measure for this item is to increase the cure rate on 181-360 days delinquent non-consolidation Direct Loan portfolio by 1% over the FY 2003 baseline by September 2004. This goal was achieved in January 2004. The goal for FY 2004 is 55.1%. The actual rate for February 2004 was 58.2%. Direct Loan Servicing staff will work to continue to achieve this goal each month thru September 30, 2004.	50 %	Green
			13.5	Conduct vulnerability assessment.				
					3/19/2004	The FISMA audit of the Direct Loan Servicing systems was completed. Direct Loan Servicing staff has reviewed the initial findings of the audit. After the exit review staff will consider findings and develop an action plan for correction. The corrections will be applied to the CSB network as well.	35 %	Green
					3/4/2004	Conducting (Federal Information Security Management Act (FISMA) Audit on Direct Loan Servicing. This will help determine some of the issues that might affect the CSB.	35 %	Green
16	FPS	<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>						
			16.1	Perform cohort default rate calculations, send, and post.				
					3/19/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green
					3/5/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green
			16.2	Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.				
					3/19/2004	The next LPIF calculation is scheduled for Saturday, 5.15.2004.	45 %	Green
					3/5/2004	The next LPIF calculation is scheduled for Saturday, 5.15.2004.	45 %	Green

16.3	Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.				
	3/19/2004	The February benchmark reports were reviewed and distributed. The edit passage rates for the Guaranty agencies remain high, 45 % with a 98.86% passage rate.			Green
	3/5/2004	Monthly benchmarks continued to be disseminated to guaranty agencies and internal users timely. Review of the annual data quality report is complete. Data accuracy in NSLDS continued to improve in 2003. The annual report continues to support the data quality in NSLDS and the use of its data in ED audits.	40 %		Green
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes.				
	3/19/2004	Completed.	100%		Complete
	3/5/2004	Enhancements to the LPIF calculation have been completed and were successful. LPIF fees are now calculated using two fee values. The summary files were transmitted to FMS for payment and the detail supporting the fees were provided to the guaranty agencies. All deliverables were approved and received by NSLDS staff.	100%		Green
16.5	Participate in the formulation of school cohort default rate initiatives.				
	3/19/2004	The Default Management Division has provided comments on the deliverables. Changes will be incorporated, if necessary, and provided in the final documentation.	99 %		Green
	3/5/2004	Enhancements of the CDR programs have been completed. Review of final deliverables is underway. Draft deliverables are being distributed to Default Management Division for final approval. Final deliverables will be available by Friday, 3.19.2004.	98 %		Green
16.6	Provide monitoring functionality of GA and lender reasonability on a monthly basis.				
	3/19/2004	This effort will be reassigned to the new contractor. The request to modify the Scheduled Completion Date was approved by the Investment Planning Committee. The revised Scheduled Completion Date is 9.30.2004. NSLDS will create a business case and provide a new cost analysis. The new contractor will begin work using the draft detail design document provided by the prior contractor.	50 %		Green
	3/5/2004	This effort has been reassessed and the task order has been closed with the incumbent contractor with the final deliverable of a draft detailed design document. NSLDS would like to proceed under a new task order with the new contractor once a policy and OGC decision has been finalized. Process will require a new business justification to be presented at the IPC. New scheduled completion dates will be determined under a new task order.	50 %		Red
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP.				

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					3/19/2004	Completed.	100%	Complete
					3/5/2004	The Data Prep software is now available for GA and Perkins use in submitting loan data. All deliverables were received and agreed upon by NSLDS Staff.	100%	Green
17	FPS	<i>Re-compete contract for NSLDS maintenance/ operations and transition to new contractor.</i>						
		17.2 Monitor and manage transition to new contractor.						
					3/19/2004	The transition to the new contractor continues to make progress. All call volume will be transitioned to the new contractor on 3.19.2004. The prior contractor will provide support to the new contractor through 3.31.2004.	75 %	Green
					3/5/2004	The new contractor continues to make progress in hiring new employees and becoming knowledgeable about the system. The project plan is being monitored closely and a weekly meeting is held to discuss milestones and/or potential obstacles.	50 %	Green
19	FPS	<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>						
		19.1 Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.						
					3/19/2004	QC for the March 15th load was not performed due to a FMS data issue.	15 %	Green
					3/5/2004	Review of the Quarterly Usage Report is ongoing. Completion is expected by Friday, 3.5.2004.	15 %	Green
		19.2 Quarterly evaluation of use and value added to the guaranty agency and lender review processes.						
					3/19/2004	FP Management provided comments based on review of the Consolidated Lender Scorecard Report to ensure all requirements are addressed.	22 %	Green
					3/5/2004	A recommendation to produce a Consolidated Lender Scorecard Report is pending management review.	20 %	Green
		19.3 Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.						
					3/19/2004	The final QC report format has been accepted. Results of the QC process will not be reported until the FMS issue is resolved.	35 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					3/5/2004	Changes for the Quality Control Report procedures are still being performed. Due to changes requested, this report will be completed on Thursday, 3.4.2004.	30 %	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>						
		20.1	Monitor and evaluate web page hits to drive future postings to portal.					
					3/19/2004	The final analysis report format has been accepted. The report now provides data such as number of downloads and top 20 pages visited.	40 %	Green
					3/5/2004	Second quarter analysis of the FP Portal Usage Report will not start until Thursday, 4.1.2004. After reviewing the first quarter report, it was recommended that a more detail report be used, this report will be developed by Thursday, 3.4.2004.	20 %	Green
		20.2	Maintain current and relevant information to financial partners' user community.					
					3/19/2004	Direct Loan and FFEL schools data will be loaded to the testing area the week of 4.12.2004. GA and Lender data has been validated.	25 %	Green
					3/5/2004	Verification/validation of lenders, GA's and servicers data is on going. Direct Loan and FFEL schools data will be loaded to the testing area the week of 4.12.2004.	25 %	Green
		20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.					
					3/19/2004	A draft action plan has been developed. An internal meeting is scheduled for Wednesday, 3.24.2004. The purpose of the meeting is to finalize the action plan and discuss who will be participating in the Focus Group meeting.	12 %	Green
					3/5/2004	An action plan is being developed to outline all steps needed to schedule this Focus Group meeting. The plan is scheduled to be developed by Monday, 3.8.2004.	10 %	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>						
		21.1	Review, evaluate, reconcile, and prepare performance reports.					
					3/19/2004	The staff has completed review of all reports submitted by participating states. Staff continues to work with approximately 5% of 95 % states that are currently in a noncompliant status. All states are being sent an announcement of the upcoming award year application cycle and tentative awarding information. These handful of states will be further notified of the possible impact of our not receiving amended reports may have on their future tentative awards. States will have to be in compliance or regain compliance before they can continue in the program.	95 %	Green

3/5/2004 The staff has completed review of all reports submitted by participating states. Approximately 5% of the reports have discrepancies and the staff is working with the individual states to correct these discrepancies. One issue that is common to several of these states is the inability to meet their matching requirements. As a result some states are having to submit amended reports that will go through the report review and approval cycle. 95 % Green

21.2 Prepare and submit clearance paperwork.

3/19/2004 Completed monthly follow-up with FSA/OMB liaison (Colleen McGinnis). Informed that form is still in process with OMB, however, status has been changed from "submitted" to "pending". Will continue to monitor progress on a monthly basis. Approval drop-dead date is April 2005. 95 % Green

3/5/2004 Completed monthly follow-up with FSA/OMB liaison (Colleen McGinnis). Informed that form is still in process with OMB. Will continue to monitor progress on a monthly basis. Approval drop dead date is April 2005. 95 % Green

21.3 Review and approve applications from states. Obligate, generate, and mail grant award notifications to states.

3/19/2004 The deadline dates notice has been reviewed by Financial Partners and forwarded into Departmental clearance. Currently, the notice is with FSA's Policy Liaison and Implementation. The applications for this award year are due from the states on Friday, 5.14.2004. 25 % Green

3/5/2004 The deadline dates notice is complete in draft form and ready to submit for departmental clearance. The applications for this award year are due from the states on Friday, 5.14.2004. 20 % Green

22 FPS Perform Voluntary Flexible Agreement (VFA) activities.

22.1 Perform cost neutrality analysis and provide results.

3/19/2004 The change in the Scheduled Completion Date from 2.28.2004 to 4.30.2004 was approved at the Investment Planning Committee meeting held on 3.10.2004. The change in date was needed as a result in a change in the approach of the project. Work to complete the gathering and analysis of cost savings information is underway and on target according to the milestones of the new delivery schedule. 72 % Green

3/5/2004 An action plan to compile and reconcile all of the information on cost/savings and produce the annual report by Friday, 4.30.2004 has been developed. Need to negotiate new milestone date with FP senior management and then present to FSA's COO and Management Council. Significant progress against the action plan was accomplished in a face-to-face meeting on Thursday, 2.26.2004, with EdFund Executive Management. EdFund is the primary servicing and operational organization that works on behalf of the California Student Aid Commission (CSAC) and the organization that has implemented the Voluntary Flexible Agreement (VFA). The meeting produced a recommended methodology for identifying savings from the CSAC VFA and a model populated with data to support the approach. 70 % Green

22.2	Prepare performance measure assessment and benchmarking reports.				
	3/19/2004	The change in the scheduled completion date for #22.1 will provide the opportunity to begin piloting monthly performance measures and benchmarking in June 2004. The reason is that the preliminary analysis on cost savings data from American Student Assistance (ASA) and the California Student Aid Commission (CSAC) indicates that there is useful obtainable performance measure information from both agencies. This cost savings information, as well as information from the other two VFA guarantors, will be used as baseline measures. The IPC requested that we identify a new milestone under project 22.2 for the pilot reporting process and begin providing regular status information on its progress.	40 %	Green	
	3/5/2004	Action plan was developed using the existing resource to accomplish the scheduled completion date. This new plan will leverage existing efforts being performed under the cost neutrality analysis initiative to identify, track, monitor, and report on a set of performance measures that reflect the cost/savings of the individual VFA programs. Target implementation of a pilot process is scheduled for June 2004 and includes a process monitoring and improvement period prior to final implementation. The first formal quarterly report is scheduled for the 4th quarter of FY04 (9.30.2004).	40 %	Green	
22.3	Evaluate new applications for VFA.				
	3/19/2004	Documentation of the evaluation process (used to date) for Colorado's VFA proposal will be completed by Monday, 3.22.2004. This will form the baseline process used for completing the Missouri VFA proposal, and the VFA component associated with the Arkansas Management plan. Timeframes for the process used on Colorado beginning in December 2003 will be used as the baseline for improving the timeliness of the overall VFA evaluation process.	58 %	Green	
	3/5/2004	No progress for this reporting period. The resource on these initiatives was focused on preparing for and executing the California Student Aid Commission (CSAC) and Texas Guaranteed Student Loan Commission (TG) VFA program reviews, establishing a method for identifying savings associated with the CSAC VFA model, developing action plans for other sub projects under this heading, and completing analysis work necessary to continue the analysis of the Colorado and Missouri proposed VFAs.	55 %	Green	
22.4	Foster effective working relations with guaranty agencies during scheduled site visits.				
	3/19/2004	The effectiveness of the working relationships developed to date with the VFA guarantors will be tested over the next few weeks as we continue to discuss cost neutrality of the individual agreements and what that may ultimately mean to the VFA concept. The non-VFA portion of the FFEL industry is also focused on the outcome of the cost neutrality initiative and questions from those guarantors have greatly increased and are being managed effectively.	55 %	Green	
	3/5/2004	The California Student Aid Commission (CSAC) program review provided an excellent opportunity to further develop relations with that organization. Mike Sutphin was able to meet with Senior and Executive Management on a number of areas including recommendations for increasing communications, feedback and impacts of the Citibank Exceptional Performer agreement, understanding the challenges/rewards associated with the VFA agreement, and recommendations for ED on addressing the use of Direct Loan Consolidations as a collection recovery mechanism.	50 %	Green	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
			23.1	As appropriate integrate ERM work with other FSA business units. Identify opportunities to integrate at the enterprise level.				
					3/19/2004	FP ERM Workgroup members are compiling issues/problems with respect to current FP file index and misfiled documents. A list will be developed and shared at the next FP/SEC combined workgroup meeting on Thursday, 3.18.2004. In addition, a con-call will be held with ECMC and the School channel to discuss the changing of the web servers and the URLs.	25 %	Green
					3/5/2004	FP ERM Workgroup will meet on Tuesday, 3.2.2004 to discuss issues relating to current FP file index and misfiled documents. Each participant will provide file index and misfiling issues/concerns/ problems. A list will be developed and shared at the next FP/SEC combined workgroup meeting on Tuesday, 3.9.2004.	20 %	Green
			23.2	Analyze and evaluate the current use of the Electronic Records Management system within Financial Partners to identify improvements that would raise the effectiveness and efficiency of the system.				
					3/19/2004	The requested change to the Scheduled Completion Date from 3.31.2004 to 5.31.2004 was approved by the Investment Planning Committee. FP staff is compiling issues/problems. Findings will be included in draft work plan.	40 %	Green
					3/5/2004	In preparation to revise draft work plan, FP staff will meet on Tuesday, 3.2.2004 to discuss issues and needed improvements identified in ERM. However, the work plan schedule identifying when improvements will be completed will be coordinated with the Schools Channel (as part of the ERM Workgroup). Therefore, the plan will not be completed by Wednesday, 3.31.2004. New completion: Sunday, 5.30.2004.	38 %	Green
24	FPS	<i>Promote effective and efficient communications internally and externally.</i>						
			24.1	Coordinate and enhance communications within Financial Partners as well as with the user community.				
					3/19/2004	Per IPC's approval, this project and subsequent milestones have been cancelled.	00 %	Cancelled
			24.2	Hold quarterly checkpoints for all areas of FP service concerning communications.				
					3/19/2004	Per IPC's approval, this project and subsequent milestones have been cancelled.	00 %	Cancelled
25	FPS	<i>Enhance program monitoring and oversight.</i>						
			25.1	Participate and provide Financial Partners Channel support for ED audit.				
					3/19/2004	At the request of Ernst & Young (E&Y), FP provided copies of OIG findings, FP reviews, Guaranty Agency audits, etc. E&Y is in the process of determining GA site visits based on part of FP provided data.	30 %	Green

	3/5/2004	FSA/CFO continue to meet with Ernst & Young. FP waits for meeting outcome. There is no FP activity at this time.	25 %	Green
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers. Use results to determine technical assistance, future monitoring and oversight needs. Coordinate the interpretation of the code of Federal regulations with all elements of the Department of Education that include legal, policy, CFO, general managers and COO in performing our reviews and assessing liabilities.			
	3/19/2004	During this reporting period the FP National Review Teams conducted program review site visits at the Texas and NELA guaranty agencies and at the loan servicer ACS. Results will be compiled and review reports will be drafted once the teams have returned from the review sites and have finalized their analysis. A final program review report was issued for the National Student Clearinghouse, Herndon VA. This report contained several findings and observations, two of which involve shortcomings in the reporting of graduate status and transfer students. Due to the nature of these findings and their relevance to schools, the review team recommended that the report also be shared with the Schools Channel. FP's representative on the Common Review Initiative (CRI) Governance Committee attended a CRI Council meeting (via conference call). CRI program review dates were scheduled and team assignments were made. The role of FP program review staff in the CRI process was discussed, as was the issue of how to measure CRI effectiveness in order to move the initiative from a pilot project to an approved process.	28 %	Green
	3/5/2004	A two-week program review site visit to the California Student Aid Commission (CSAC) will conclude during the week ending March 5th, as will the first week of a two week site visit to the Texas guaranty agency. Both CSAC and Texas are VFA guaranty agencies. The results of both reviews will be determined and review reports will be drafted once the teams have returned from the site visits. The first joint ED-guaranty agency CRI (Common Review Initiative) program review of a student loan servicer is scheduled to be conducted next month (April 2004). The ED and guaranty agency team leads met via conference call in order to coordinate logistics for the review and to finalize the work plan and team assignments. It was determined that at least one of the Sallie Mae (SLMA) program review site visits will be moved out until October 2004, so that SLMA's final resolution of their servicing problem can be evaluated. The quarterly report remains unchanged for this period. Findings have been drafted for the 2 servicer reviews conducted during this fiscal year and the results have been circulated within FP. Issuance of the final review reports is pending input from the OIG and other functional areas within FSA and ED. Once the review reports have been finalized the findings will be incorporated into the quarterly report. Pre-on-site data analysis continues for scheduled program reviews. The purpose of the pre-on-site analysis is to identify areas where problems may exist, so that those areas can be more fully evaluated during the site visit. Any findings resulting from the analysis and subsequent on-site evaluation will be described in the review report.	23 %	Green
25.3	Analyze and collect third-party audit findings. Use results to determine technical assistance, future monitoring and oversight needs. Utilize PEPS to integrate findings.			
	3/19/2004	Review process still in progress. Letters notifying lenders of non-compliance are also being mailed. Staff continuing to follow-up and respond to questions from lenders.	70 %	Green
	3/5/2004	FP staff is still in process of reviewing and analyzing lender audits as well as preparing Program Determination Letters (if applicable). Follow-up with lenders who are not in compliance is still being conducted.	60 %	Green
25.4	Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.			

3/19/2004 Ran FY02 data for the GA scorecard on all the GA's. Information was needed for an audit response. Data obtained from GA scorecard was adequate for our exercise. There will still be some metrics to improve on the GA scorecard as move forward. 35 % Green

3/5/2004 Ran the Texas Guaranty (TG) GA scorecard to determine if FY03 data loaded. Nothing came up indicating that changes are still 23 % being made to ED Form 2000. We ran a report for FY02 to see how adequate the data was. Six of the nineteen performance factors worked based upon information we had. We plan to do more analyses on the other thirteen metrics in the coming weeks. A GA review is being conducted at TG during the next two weeks and the review data will be compared to the FY03 scorecard once FY03 information has been loaded into FP Data Mart. Green

25.5 Partner with guaranty agency community on the Common Review Initiative (CRI) process. Define Financial Partners Channel's role in CRI.

3/19/2004 Completed. 100% Complete

3/5/2004 The four regional offices have worked with the staff from the Common Review Initiative (CRI) who was responsible for putting together the initiative. The regional offices of FP will be responsible for review of the LaRS billing form. The CRI reviews will not review this form. Since the form cannot be reviewed with a review of other areas of the review entity FP staff will go on-site at the same time as the CRI review team. The two teams will work together to complete the review. There will be a separate report prepared by FP staff on LaRS. This is documented in the CRI review guide put together by the guarantors who will participate in the CRI reviews. A FP staff member will be a non-voting member of the CRI governance committee in order to work with the guarantors on CRI procedures. The CRI was approved on Thursday, 3.4.2004 and a letter was sent to the CRI team. 100% Green

25.6 Conduct vulnerability assessment.

3/19/2004 FP Management met with NSLDS staff to discuss the scope of this project. NSLDS will now determine approach to accomplish this effort and identify applicable success measures. 05 % Green

3/5/2004 FP Management has selected the National Student Loan Database System (NSLDS) for vulnerability assessment. FP Management will be meeting with NSLDS staff to discuss the scope of this project, identify the business need and create success measures. 05 % Green

37 CIO Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.

37.1 Release GovLoans Gateway, a plain speak web site that educates citizens with links to federal agency and private-sector resources.

3/19/2004 The eLoans team briefed Jonathan (Jack) Koller, OMB's new E-Gov G2C Portfolio Manager, on the eLoans initiative and the status of all four workstreams and on a possible transition/migration strategy. Jack noted that OMB appreciated the eLoans team's collaborative process. He also expressed interest in the upcoming April 29 GovLoans launch event 48 % Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					3/12/2004	The GovLoans team finalized the site's content for the first release on 04/29/04, and began planning for updates, improvements, and usability testing of the live site in May 2004 and beyond. The Department of Labor/GovBenefits team invited Secretary Paige to speak at the GovBenefits 2nd anniversary event, which is also the GovLoans launch event.	45 %	Green
					3/5/2004	On March 1, the GovLoans team met with Ketchum Communications to begin development of an outreach plan for the GovLoans.gov web site. Ketchum made a brief presentation at the GovLoans working group meeting on March 3.	40 %	Green
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>						
		45.1	Complete market research to resolve plan issues.					
					3/19/2004	FEBI and Integration market research are complete. The initial phase of data strategy market research is also complete. The SAIG market research is scheduled to be completed by the end of March. However, while the preliminary research has been accomplished, the main thrust of the VDC market research will not start until the end of April 2004 due to nonavailability of resources. The internal objective to have this completed by April 1, 2004 was not accomplished, so the status of milestone 45.1 is changed from green to yellow. The objective to complete milestone 45.1 is still on schedule for September 30, 2004.	70 %	Yellow
					3/5/2004	No change from last report.	70 %	Green
		45.2	Synch Plan w/BIG End State Vision.					
					3/19/2004	After market research is complete, decisions on procurement execution will be incorporated in the plan.	20 %	Green
					3/5/2004	No change from last report.	20 %	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>						
		47.1	Incorporate CSB into enterprise process.					
					3/19/2004	The Enterprise Process is still being established. Contractor support has been engaged to do a "Proof of Concept" with CSB to initiate the process by April 30, 2004.	25 %	Yellow
					3/5/2004	No change from last report.	05 %	Yellow
		47.2	Incorporation of FEBI into process by September 30, 2004.					

3/19/2004	The Enterprise Process is still being established. The Front End Business Initiative (FEBI) is still in the early stages of acquisition. February 28, 2004 is not achievable. The following change was approved by the IPC: ·Action Item - Change Incorporate Integrated Front-end Delivery System (REDS) into enterprise process to read: o Incorporate Integrated Front End Business Integration (FEBI) into enterprise process. ·Success Measures - Change Incorporation of FEDS into process by February 28, 2004 to read: o Incorporation of FEBI into process by September 30, 2004.	70 %	Yellow
3/5/2004	No change from last report.	00 %	Red

48 EPMS Continuously update and monitor procurement internal controls.

48.1 Establish monitoring and reporting process for government furnished property.

3/19/2004	A study completed in February 2004 confirms that a detailed monitoring and reporting process for government furnished property exist within ED and FSA. This completes this Action Item. The study also highlights that the existing process is not being followed, and that tools to support the process are inadequate. A business case for Contractor Support to improve the execution of the government furnished property management process was approved on March 17, 2004. This Action Item should be replaced with the following new action items: Action Item: Establish auditable government furnished property (hardware and software) inventories. Success Measures: By April 30, 2005, completion of verifiable (through audited vendor and/or Government documentation) Government Property hardware and software inventories that account for at least 90% of Government Property for 90% of the legacy contracts. Action Item: Establish auditable FSA government furnished property management controls. Success Measures: Auditable government furnished property management controls on 100% of new contracts awarded through April 30, 2005.	100%	Green
3/5/2004	A candidate with specific responsibility for FSA government furnished property management has been selected, and will start on March 22, 2004. Contact has been made with the ED Property Manager, and data is being exchanged on integrating the FSA property information into a Department of Education Asset Management System (scheduled for deployment in September 2004).	10 %	Green

48.2 Establish reporting process to monitor vendor performance.

3/19/2004	Person behind this initiative started work on Jan 12, 2004. Initiating Contractor support to help plan and develop the enterprise vendor performance process, including performance reporting.	10 %	Green
3/5/2004	No change from last report.	05 %	Green

49 EPMS Increase contract dollars awarded to small businesses.

49.1 Increase dollars awarded directly to small businesses.

Milestone# Action Item

Status Date	Comments	%Complete	Status
3/19/2004	Per IPC's approval, this milestone has been cancelled.	00 %	Cancelled
3/19/2004	This milestone was deleted.	100%	Green
49.2	Increase dollars awarded through large business primes to small business subs.		
3/19/2004	This milestone was deleted.	100%	Green
3/19/2004	Per IPC's approval, this milestone has been cancelled.	00 %	Cancelled

54 AWSS Deliver workforce development and support programs.

54.1 Continue Intern Program.

3/22/2004	We have received over 400 resumes from perspective students interested in participating in FSA Intern Program. 28 FSA Managers have requested interns for the Summer 2004 program. Thus far, 4 students have been selected for position in CIO, CFO and Contracts and Acquisitions, respectively. The recruitment process will continue through April.	70 %	Green
3/5/2004	The recruitment process has begun for FSA's summer 2004 Internship program. The intern website has been updated to reflect the current application process. Due dates, start and end dates, and the length of 10 weeks for the summer program has been established in concert with ED's personnel office.	70 %	Green

54.2 Conduct FSA Orientation.

3/18/2004	The FSA NEOP material for the March 17 training has been revised. A storyboard for the content of the FSA NEOP video was developed, presented, and approved. The list of participants for the FSA video is being compiled for review.	66 %	Green
3/5/2004	The "Dry Run" of the FSA NEOP was conducted on March 1, 2004. The final draft of the material for the FSA Supervisor's Checklist has been completed. Final print of the checklist will be completed by March 16, 2004. The first FSA New Employee Orientation Training is scheduled for March 17, 2004.	66 %	Green

54.3 Implement results of One-ED Competitions.

3/22/2004	The Department recently announced on ConnectED that performance award decisions on the proposals submitted for both the human resources/training and payment processing public-private competitions are projected to be made no later than June 30, 2004.	00 %	Green
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3/5/2004 There have been no additional inquiries since our last report. However, we have provided information requested by the Office of Inspector General in support of their audit of the One ED process. We anticipate that an announcement will be made at the end of March, 2004. 00 % Green

54.4 Update Skills Catalog/Learning Tracks.

3/18/2004 We've met with the School Eligibility Channel, Title IV Delivery Division and School Relations Division. These were great meetings that have helped us to almost complete ASEDS. We are currently updating all the information we've received and sending it to them for final reviews. 50 % Green

3/5/2004 We met with Amelia Lancellotti, a paid contractor from TDC, who helped us with reformatting the skills catalog. It was previously created with special styles that make it very hard to paste updated information into it. We are now in the process of manually deleting these hard to use styles, and getting the document ready for the updated information from the business units. We've updated CIO's information and sent it to them for review. We've updated Policy's information and will send it to them this week for final review. We also prepared the School Eligibility Channel's section and will send it to them prior to our first meeting with them on 3/4. We are also updating the master skills list to include every skill we've used in the catalog to help in updating the sections. We have also scheduled a meeting with the Career Zone to get the career counselors up-to-speed on the catalog and show them how they will be able to use it in our organization. 45 % Green

54.5 Implement Workforce Alignment Strategy.

3/22/2004 We are presently on track to complete all necessary activities so that a reorganization package will be ready to advance to OM before the end of April. 50 % Green

3/5/2004 We have successfully extended the period of performance for the Workforce Alignment contract until April 30, 2004. We are presently on track to complete all necessary activities so that a reorganization package will be ready to advance to OM before the end of April. 50 % Green

54.6 Update the FSA Human Capital Plan - reflecting the mission-critical challenges, workforce needs and plans for recruiting, retaining, developing and motivating staff.

3/22/2004 Management Council has authorized the use of support from Partnership for Public Service in the development of our human capital plan. Several initial meetings have been held with staff from the Partnership, the management council, the Chief Operating Officer and Chief of Staff and Workforce Support Services. Arrangements have been made to conduct interviews with several managers across FSA to gather data about their human capital priorities/needs. 25 % Green

55 AWSS Perform facilities management activities.

55.1 Implement facilities needs.

Status Date	Comments	%Complete	Status
3/18/2004	Project contact has had family emergencies including medical and catastrophic which required time away from the office. Substitute reported information that did not pertain to the Success Measures. After meeting with the Project contact, it was realized that this project had in fact been completed within the Target Completion Date of 1/31/2004. Documentation will be provided that will support the Success Measures identified and the completion of this milestone.	100%	Complete
3/5/2004	Camcon provided a project schedule which shows a construction start date of 5/4/04 and completion date of 6/11/04 for floors 4, 7, and 8. They have promised a revised schedule to include floors 9 and 11 by COB 3/3/04. The revision should not extend the completion date beyond two weeks.	85 %	Green
55.2 Coordinate security needs.			
3/18/2004	All outstanding FSA Security/Safety items have been addressed. Documentation will be provided to support the Success Measures.	100%	Complete
3/5/2004	Conducted UCP SIP Drill on 2/19.	85 %	Green
55.3 Administer records management.			
3/18/2004	All records management contacts for FSA have been identified. During this reporting period, we have conducted records management interviews with the contacts in CFO and the Students Channel.	55 %	Green
3/5/2004	Continue to conduct interviews with records management contacts to prepare for the final inventory of FSA records. Received the first Records Management Inventory Report from ASEDS, External Training Branch. Since the initial request in Mid-December, FSA has assigned 80% of their records management contacts. OCIO will continue to conduct records management interviews. As of 2/25/04, FSA has assigned 100% of their records management contacts. No interviews have been conducted since 2/5 because OCIO records staff have been involved with the planning of their move to PCP. Sent follow-up message on 3/1 requesting an update from OCIO records staff on the interview process. Received a records management classification form on 3/1 from Enterprise Performance Management for review by OCIO. Met with PEPS on 2/26 to answer records management classification questions.	45 %	Green
55.4 Coordinate the distribution of the Transit Benefit program.			
3/18/2004	Final revisions are being made to survey questions.	95 %	Green
3/5/2004	On 2/25/04, met to discuss layout of survey and review questions to be asked.	95 %	Green

61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management and Oversight (eCMO), National Student Loan Data System (NSLDS), and electronic Campus-based systems.				
	3/19/2004	Received approval on the Data Strategy Target Vision Functional Gap Analysis Draft (152.1.3a) and the Data Strategy Target Vision Enterprise Analytics Architecture Option Analysis Draft (152.1.4a) deliverables. Held sub-team working sessions during weeks of 3/1 and 3/8 for many of the sub teams involved in the Data Framework and Technical Strategies efforts. The CSB Impact Analysis will be complete by April 30, 2004. The FFEL and Student Enrollment Data Flow Option Analysis will be completed by May 31, 2004. The remaining items (e.g. eCMO, NSLDS, Campus Based Systems) mentioned in the action item will be completed by September 30, 2004.	25 %	Green	
	3/5/2004	Completed and submitted Target Vision Functional Gap Analysis 152.1.3a and Target Vision Enterprise Analytics Architecture Options Analysis 152.1.4a deliverables. Continued holding working sessions with FSA SMEs for CSB Impact Analysis. Please Note Due Date Change to reflect final due date of final deliverable within this task, rather than due date of first deliverable in this task.	15 %	Green	
61.8	Conduct market research to validate the feasibility of the target conceptual design (Option D).				
	3/19/2004	Completed the XML Registry Logging and Statistics design document, wireframes for XML Registry enhancements, and high-level designs for the XML Registry enhancements for inclusion in the production release scheduled for the end of May. Please Note Due Date Change to reflect due date of final deliverable within this task. The Front End Business Integration market research validated the feasibility of the critical components of the Data Strategy vision.	100%	Green	
	3/5/2004	Held Data Quality Steering Committee meetings on 2/27/2004. Began drafting Data Quality reports and tools.	15 %	Green	
61.9	Develop the detail Data Quality Execution Plan.				
	3/19/2004	Completed Data Quality Steering Committee Meeting (3/9/2004). Beginning implementation of the Prioritization Phase of the Data Quality Methodology.	25 %	Green	
	3/5/2004	Held Data Quality Steering Committee meetings on 2/27/2004. Began drafting Data Quality reports and tools.	15 %	Green	
61.10	Develop a holistic XML Management Plan.				
	3/19/2004	Completed Data Quality Steering Committee Meeting (3/9/2004). Beginning implementation of the Prioritization Phase of the Data Quality Methodology. 3/5/2004 - Reviewed and finalized XML Registry enhancements and requirements for inclusion in the production release scheduled for the end of May.	25 %	Green	
	3/5/2004	Reviewed and finalized XML Registry enhancements and requirements for inclusion in the production release scheduled for the end of May.	15 %	Green	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
			61.11	Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.				
					3/19/2004	Development team has been analyzing the effectiveness of the SSIM algorithm as it compares to the CPS algorithm. Emphasis of research has focused on accuracy of algorithm, and exception conditions. Exception conditions have been identified which will make SSIM implementation difficult, unless additional methods can be determined to automate the exception process. The analysis for applications into the system is primarily complete, and shifting to correction sources.	30 %	Green
62	BS	Begin the implementation of Common Services for Borrowers (CSB).						
			62.2	Begin implementing Phase 1 of the FSA-approved transition plan.				
					3/19/2004	Contracts – Several software licensing and term of contract issues have been revealed that could possibly increase funding. Development – The project schedule is being reviewed and a new baseline may be proposed. Infrastructure – Software licensing issues have been identified. Use of and applicability of some license need to be defined. Operations – Nothing new to report. Oversight – Nothing new to report.	25 %	Green
					3/4/2004	Contracts – Minor pricing discrepancies in the first invoice have been noted. Research is progressing to identify the source of the discrepancies. Development – The project management status report was received from the ACS Team. FSA review of the first report indicates slight slippage in the schedule for phase one. Infrastructure – Nothing new to report. Operations – Nothing new to report. Oversight – The Independent Validation and Verification (IVV) system continues to operate at minimum level pending a task award from the GSA.	25 %	Green
63	ADS	Improve school partner oversight.						
			63.1	Implement Integrated Partner Management (IPM) system.				
					3/19/2004	Requirement gathering and preparation of work requests for IPMS competitive bid continues. See milestones 63.2 and 63.6 for more details.	51 %	Green

3/5/2004 Market research complete. Continuing requirement gathering and preparing two work requests for Integrated Partner Management System (IPMS) competitive bid. See milestones 63.2 and 63.6 for more details. 47 % Green

63.2 Develop Consolidated requirements for IPM system.

3/19/2004 Both deliverables were revised and resubmitted. 52 % Green

Non-Case Management Deliverable was resubmitted on 3/8/2004, reviewed, and recommended for acceptance to COR/PMO (Debbie Bairdane).

Financial Partner Eligibility and Oversight As-Is Flow Documentation was resubmitted for review on 3/12/2004 and is being reviewed.

3/5/2004 Review of both 2/16/2004 deliverables showed errors and needed changes. Deliverables were rejected are expected to be revised and resubmitted by 3/21/2004. 74 % Green

Financial Partner Eligibility and Oversight High-Level Requirements Deliverable continues on track for 3/12/2004 submission.

63.6 Select competitively a vendor to perform the conceptual design and development of the IPM system.

3/19/2004 Currently preparing two work requests for IPMS for a conceptual design to be awarded to the Integrated Leadership Solution Contractor (ILSC). The ILSC contract is currently scheduled for award at the end of April 2004. 80 % Green

3/5/2004 Currently preparing two work requests for IPMS competitive bid. 47 % Green

63.8 Procure the design of a workflow tool for SEC.

3/19/2004 Discussion/consideration continues in conjunction with FEBI and Data Strategy teams. 47 % Green

70 ADS Increase Student Financial Aid program awareness.

70.1 Expand federal student aid awareness and outreach program.

3/19/2004 Developing Proposed Business Justification for presentation to the Decision Support Group (DSG) and Investment Planning Council (IPC) for approval to expend reserved funds. 15 % Green

3/5/2004 Developing Proposed Business Justification for presentation to the Decision Support Group (DSG) and Investment Planning Council (IPC) for approval to expend reserved funds. 10 % Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
			70.2	Develop and implement long-term mass marketing strategy.				
					3/19/2004	Included in Proposed Business Justification will be our communication tactical plan and a proposal to contract for expertise in measuring marketing campaigns and benchmarking future efforts.	20 %	Green
					3/5/2004	Included in Proposed Business Justification will be our communication tactical plan and a proposal to contract for expertise in measuring marketing campaigns an benchmarking future efforts.	15 %	Green
71	ADS	Reengineer EDEExpress.						
			71.3	Implement Return to Title IV Web Release.				
					3/19/2004	Acceptance testing for Return to Title IV Funds began on March 15, 2004. While testing is on schedule, we are in the process of completing a System of Records Notice (SORN) that will postpone the release of the software to the Web until late June or early July. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in August, 2004. The PRR for Return to Title IV on the Web iwas tentatively scheduled for late March or early April with the software being pushed to the web site by mid-April. The software (PRR) should be on schedule. The actual posting will be delayed until late June or early July because of the SORN's required processing time.	90 %	Yellow
					3/5/2004	R2T4 has been resubmitted to the CIO to finish accessibility testing. It should be signed off soon. Acceptance testing by FSA is scheduled to begin March 15th and run for two weeks. The final testing team has been approved.	90 %	Green