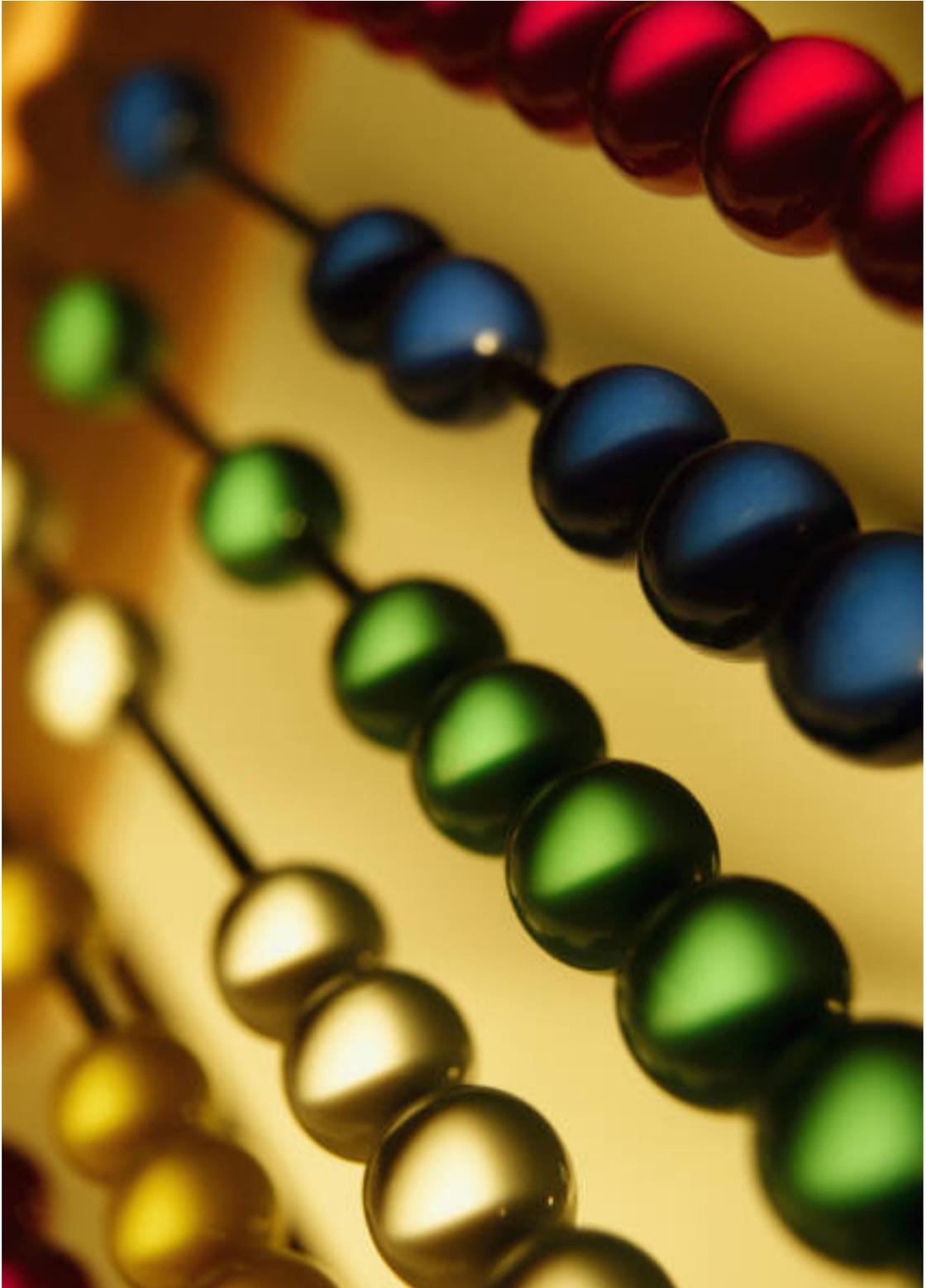


Bi-Weekly Report as of April 5, 2004



FSA Performance Plan – FY2004

SUMMARY

COMPLETED PROJECTS

- Project 57 (*Develop trial balance capability for COD and CSB to facilitate and expedite the reconciliation process*) has been completed as a result of developing trial balance capability for Direct Loan Servicing, and determining that COD's Student Account Statement to COD's Database reconciliation will be used as its trial balance.

GREEN LIGHT

- Total default recoveries for March 2004 were the highest ever in a single month at \$242.6 million. Total default recoveries for FY 2004 through March 31, 2004 was \$886.3 million, an increase of 20 percent from the same period last year. (*Project 13 – Enhance program monitoring and oversight*)
- FSA management and staff continue to meet with GAO and provide information as requested. The oversight of school participants is still the greatest area of concern in the high-risk plan and requires continued management attention. (*Project 53 – Prepare and continually monitor and report on the accomplishments of the High-Risk Plan*)
- The final awards for the Campus Based programs were issued to schools on March 23, 2004. The testing of the new software is on track for release by June 30, 2004. (*Project 6 – Administer Campus-Based [eCB] activities*)
- As of March 31, 2004, 114 Learning Coupons have been processed. This represents 23 percent of the goal of having 45 percent of FSA employees participate in this program. The program has obligated \$43,836.00 which is 21.6 percent toward the goal of obligating 90 percent of funds budgeted. (*Project 69 – Continue Learning Coupon program*)

YELLOW LIGHT

- Although contract support has been engaged, significant effort is required over the next six months to establish the Enterprise Process. At the present rate, the task is at risk and management is in the process of evaluating a methodology for maximizing efforts to get this task on a positive path. (*Project 47 – Implement enterprise contract performance monitoring measures against new systems contract awards*)
- The Solution Life Cycle project within FSA continues to be on hold until the outcome of One ED's Solution Life Cycle project is known. (*Project 51 – Evaluate and implement selected project management standards based on the system development methodology*)
- The EDEExpress Pell and Direct Loan modules for the 2004-2005 processing cycle will be available for user download as soon as the software is posted in early April. This Project (*Project 4 – Provide EDEExpress application modules*) had a completion date of March 2004.

ACTION PLAN STATUS AT A GLANCE

as of April 5, 2004

FSA No.	Indicator	Status
1	IMPLEMENT STUDENT AID AWARENESS INITIATIVES	
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	IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER	
2.1	Monitor customer feedback to improve services	
3	CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)	
3.1	Implement application	
4	PROVIDE EDEXpress APPLICATION MODULES	
4.1	Release application module	
4.2	Release Common Origination and Disbursement module	
5	PROCESS PELL & DIRECT LOAN TRANSACTIONS THROUGH COD	
5.1	Issue COD software release	
5.2	Issue COD SOO	
6	ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES	
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	UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)	
7.1	Complete Oracle 9i Upgrade	
7.2	Upgrade Windows NT server that houses the E-App	
8	EXPAND eZAUDIT INITIATIVE	
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	ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP & DEL SERV)	
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	PRODUCE SCHOOL PUBLICATIONS AND MATERIALS	
10.1	Annually update and disseminate the Federal Student Aid Handbook	
10.2	Update and disseminate Direct Loan Program publications	
11	DEVELOP & DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS	
12	TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)	
13	ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)	
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 April 5, 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 April 5, 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 April 5, 2004

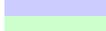
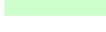
FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	
54.1	Continue Intern Program	
54.2	Conduct FSA Orientation	
54.3	Implement results of One-ED Competitions	
54.4	Update Skills Catalog/Learning Tracks	
54.5	Implement Workforce Alignment Strategy	
54.6	Update FSA Human Capital Plan	
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	

ACTION PLAN STATUS AT A GLANCE

as of April 5, 2004

FSA No.	Indicator	Status
64.1	Improve the effectiveness of verification	✓
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)	
65.1	Conduct market research	✓
65.2	Issue CPS Statement of Objective (SOO)	✓
66	RE-ENGINEER NSLDS (PENDING DATA STRATEGY OUTCOME)	
67	PREPARE TO IMPLEMENT IRS DATA MATCH	
68	CONTINUE LEARNING COUPON PROGRAM	
69	PROVIDE CAREER ZONE SERVICES	
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	
70.1	Expand federal student aid awareness and outreach program	
70.2	Develop and implement long-term mass marketing strategy	
71	RE-ENGINEER EExpress	
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	
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	

Key:

-  On Track
 -  Progress Concerns
 -  Not Reported
 -  Management Intervention Required
 -  Completed
 -  Cancelled
 -  Operations
 -  Discretionary
- The project will not be completed in FY 2004 due to a shift in FSA leadership priorities, and therefore, unappropriated resources.

FSA Project Status Report

FSA No	Area	Action Item	Status_Date	Comments	%Complete	Status
1	ADS	Implement student aid awareness initiatives.	4/2/2004	Partnership activities continue to thrive, e.g. continued partnership with White House Initiative of Excellence in Hispanic Education. FSA has participated in five 'Feria Educativa' initiatives to date and presented at the second HUD Neighborhood Networks Regional Technical Assistance Workshop. Publication activities for the '05-'06 award year will be informed by the results of the usability study being conducted this Spring. Preliminary results of web sites will be delivered April 13th. As of April 2nd, SAA and FSA Ambassadors have distributed materials/information to over 60,000 interested individuals. Student Aid on the Web (www.studentaid.ed.gov) continues to have high numbers of visitors and hits. This site shows increased utilization of the FAFSA pre-pop functionality as well as school application pre-pop.	30%	Green
			3/19/2004	Exceeding expectations in several sub-tasks.	25%	Green
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).	4/2/2004	CCSC continues to make progress in 3 areas identified for improvement and has implemented two additional initiatives to improve customer interaction. See milestone for details.	50%	Green
			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
4	ADS	Provide EDEXpress application modules.	4/2/2004	The PRR for the 2004 2005 EDEXpress Release 2.0, which includes Pell and Direct Loan modules was held on March 26, 2004. The software will be posted on April 5, 2004. With this posting the project is complete.	99%	Yellow
			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 EDEXpress 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
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>		
		4/2/2004	Final FEBI Phase 1 RFP containing Origination and Disbursement requirements was released on March 26, 2004. Proposals are do by April 15, 2004.	67%	Green
		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. Milestone 5.2 continues on track for release of final RFP on 3/31/2004.	62%	Green
6	ADS		<i>Administer Campus-Based (eCB) activities.</i>		
		4/2/2004	Project continues on track. Final awards were issued to schools on 3/23/2004. Testing of new software is on track for release by 6/30/2004.	67%	Green
		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
8	ADS		<i>Expand eZAudit initiative.</i>		
		4/2/2004	FSA has received OMB forms clearance for e-Zaudit for 6-months, through 9-30-04. In addition, OMB has indicated that they will approve a 3-year clearance upon receipt of our forms clearance package. We have implemented enhancements for the A-133 schools, and have posted info to IFAP to assist schools in registering, avoiding common mistakes, and submitting their audits & financial statements. We are continuing to register schools and process submissions, as well as gear up for an expected peak workflow in the coming weeks.	67%	Yellow
		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. 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.	65%	Yellow
9	ADS		<i>Enhance program monitoring and oversight.</i>		
		4/5/2004	School Relations projects continue to progress. Expirimental Sites initiatives annual reports are nearly finished. Quality Assurance ISIR tool remains on schedule. Vulnerability assessment preparatory work continues and is on track.	45%	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>		
		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 Preparatory work continues on vulnerability assessment. See milestone 9.6 for details.	43%	Green
10	ADS		<i>Produce school publications and materials.</i>		
		4/5/2004	The Application/Verification guide has been sent to GPO. Most of the student handbook is in review save for part 5 which is still in development and part 2 which has been posted on IFAP. The revised Direct Loan Exit Counseling Guide has been printed, and school orders are being fulfilled. The revised Direct Loan Entrance Counseling Guide is being submitted for a print bid with expected availability at the end of April 2004. Review of two revised Direct Loan brochures--DL Basics and DL PLUS Basics--has begun. There are only eight back-ordered requests at the warehouse. These requests are for the DL PLUS Basics brochure that is currently being revised.	53%	Green
		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
11	ADS		<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>		
		4/1/2004	--Award new training contract by April 2004. On schedule for award of new training contract by April 2004. Milestone: RFP for new training contract is "On the street" as of 3/17, and closed on April 2. --Implement new registration system by March 2004. . (Additional market research delayed the posting of the fedbizopps solicitation by approximately two weeks.) Milestone: Fedbizopps solicitation was posted on 3/22. Proposals were due by 3/29. Review of proposals has begun, will be completed by mid-April. Award is expected in April. --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. Data for Electronic Application Processing training will be compiled after these sessions end in April.	60%	Green

<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	<p>--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.</p> <p>--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.</p> <p>--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.</p>	60%	Green
13	BS	<p><i>Enhance program monitoring and oversight.</i></p> <p>4/5/2004 Each of the milestones for this item is on track.</p> <p>Total default recoveries for March 2004 were the highest ever in a single month at \$242.6 million. Total default recoveries for FY04 thru March 31, 2004 (2nd quarter) was \$886.3 million, an increase of 20 percent from the end of the 2nd quarter in FY03.</p> <p>The Risk Management Group has developed a draft measure for cohort years 1994 and 1995 of the Direct Loan portfolio. Review with the General Manager of Borrower Services is pending. OIG has been provided a write-up of the initiative related to the development of the Lifetime Default Rate (LTDR).</p> <p>Staff has completed the exit review for the FISMA audit and will incorporate the necessary changes for DLSS to CSB.</p> <p>The website mapping plan for the integration of all of Borrower Services websites will be completed during the week of April 5th.</p> <p>FSA staff and the ACS Team are continuing work on phase one of the implementation plan.</p>	50%	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>		
		3/19/2004	Each of the milestones for this item is on track. 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.	35%	Green
14	BS		<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i>		
		4/5/2004	The website mapping plan for Borrower Services websites (Collections, Direct Loan Servicing, Direct Consolidation Loans) will be completed the week of April 5, 2004.	50%	Green
		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
15	BS		<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>		
		4/5/2004	The 20% reduction in overpayments and 10% reduction in underpayments were achieved in November 23, 2003. These reductions have continued to be sustained thru February 2004. The target for overpayments for February 2004 was \$2,265,585; the actual dollar amount was \$2,084,949. The target for underpayments for February 2004 was \$778,092; the actual dollar amount was \$676,487. Consolidation staff will continue to work to sustain the 20% reduction in overpayments and 10% reduction in underpayments each month thru September 30, 2004. The report for March underpayments and overpayments will be submitted on April 16th.	50%	Green
		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
16	FPS		<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>		
		4/2/2004	NSLDS Maintenance and Operations Activities operating efficiently. Task order work is complete. A new task order for Guaranty Agency reasonability will be opened for the new contractor.	64%	Green

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		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
17	FPS		<i>Re-compete contract for NSLDS maintenance/ operations and transition to new contractor.</i>		
		4/2/2004	The transition to the new contract is complete. Transferred documentation is under review.	99%	Green
		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
19	FPS		<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>		
		4/2/2004	Maintenance and operations activities for this week include resolving Lender scorecard issues.	45%	Green
		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
20	FPS		<i>Perform Financial Partners Portal operations activities.</i>		
		4/2/2004	Focus Group conference call is scheduled for Wednesday, 4.7.2004. Direct Loan and FFEL school data is being verified/validated.	40%	Green
		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
21	FPS		<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>		
		4/2/2004	All states received an E-announcement on the 2004-2005 application cycle and tentative award information. Those states having compliance issues were further notified that they would have to be in compliance or regain compliance before they can receive further funding under the programs. Additionally, states currently not in the program have been sent guidance on how to regain participation. The Information Collection Request (ICR) process to clear our application form for next years award cycle has officially began with OMB on Tuesday, 3.9.2004 and is still pending approval. Progress in the process is being tracked through status emails from OMB and monthly checkpoints by FP. In addition, the notice informing States of the LEAP/SLEAP application deadline dates has been through departmental clearance and is awaiting publication in the Federal Register.	75%	Green
		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

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22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>				
		4/2/2004	Cost neutrality recommendations for the California Student Assistance Corporation (CSAC) and American Student Assistance (ASA) are ready for CFO review. Analysis on the other two guarantors is on schedule to meet the overall 4.30.2004 delivery date for the Cost Neutrality Analysis. Performance measures and benchmarks being built into the Colorado agreement will serve as the model for modifications to existing VFA agreements to facilitate the process being piloted beginning June 2004. A draft document outlining the steps for evaluating proposed VFA's has been completed. The entire process stands at 70 business days.	65%	Green	
		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	
23	FPS	<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>				
		4/2/2004	Meeting was held on Thursday, 4.1.2004 with SEC representative. It was agreed that FP and SEC would incorporate their findings/issues into a Final Management Proposal. This proposal will identify current issues and improvements needed to the ERM.	45%	Green	
		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	
25	FPS	<i>Enhance program monitoring and oversight.</i>				
		4/2/2004	Progress with audits continues. Ernst & Young is determining GA site visits. FP will coordinate visits with appropriate GAs. The National Review teams continue to make progress with the completion of reviews at the Texas Guaranteed Student Loan Corporation (TG) and ACS Education Services. The review of the Northwest Education Loan Association (NELA) in Washington is underway. Review process of third party audit findings is ongoing with follow-up being conducted with lenders as necessary.	47%	Green	
		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	
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>				
		4/1/2004	Preliminary meetings continue with E&Y auditors.	10%	Green	

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		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
27	CFO		<i>Perform internal control reviews to enhance financial management.</i>		
		4/1/2004	The Internal Control Statement of Objectives and Independent Government Cost Estimate have been delivered to Contracts. FSA CFO staff continue to work with Contracts to prepare the Request for Proposal for full and open competition.	19%	Green
		3/19/2004	Continuing to finalize SOO.	19%	Green
28	CFO		<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>		
		4/1/2004	Answers to FSA questions regarding proposals have been received from 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. The ABC team is obtaining explanations for the reconciling items and restructuring the reconciliation presentation to be more intuitive. Also, GAO presented a number of questions regarding the ABC model that have been answered. Clarification of the questions is expected once GAO has had an opportunity to consider the answers.	22%	Green
		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
29	CFO		<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>		
		4/1/2004	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. FSA staff are implementing process improvements incrementally pending award of contract for reengineering pilot project. Received proposal 3-31-04 in response to revised RFP/SOO issued.	28%	Green
			Desk Operating Procedures: Deva has delivered procedures for all reconciliations. Currently being reviewed for approval by CFO management.		
			Other: Team lead meetings and reconciliation team meetings are held weekly to determine areas for improving/enhancing the reconciliation process. Also, working with CIO to install and implement CheckFree. Date TBD.		

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		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
30	CFO		<i>Manage FMS operations.</i>		
		4/1/2004	FMS Operations continues to operate smoothly. The only service level agreement that may not be achieved is the transaction processing time for Loan Consolidation (LC) transactions. The agreement is to process LC transactions from time of receipt to time of delivery to GAPS within one hour, the time to process may end up being approximately two hours.	50%	Green
		3/19/2004	FMS Operations continues to operate smoothly.	47%	Green
31	CIO		<i>Develop and deploy Enterprise Performance Test Architecture.</i>		
		4/5/2004	Competition is proceeding on schedule.	50%	Green
		3/19/2004	Proposals Due 3/18.	20%	Green
32	CIO		<i>Provide Enterprise and Data Architecture management.</i>		
		4/5/2004	Denise completed the EA Overview to the General Accounting Office seeking progress being made in support of getting FSA off of GAO's High Risk List. GAO focused on how the maturity of FSA's Enterprise Architecture program and value of Enterprise Reporting at FSA. Denise presented samples of OMB Reference Model Enterprise Reports to which GAO remarked that they've been looking for similar types of reports. Denise concluded her report by showing how FSA's EA is made up of Business Process Models, CPIC and IT Infrastructure and that EA cannot be successful without full support and integration of Data Architecture, Data Strategy, DSG, BIG, OMB, ED, etc.	50%	Green
		3/19/2004	No changes to report.	40%	Green
33	CIO		<i>Provide security and privacy support to FSA business units.</i>		
		4/5/2004	Had off-site last Monday and Tuesday to discuss actions to support the initiative to Eliminate IT Security as a Reportable Condition. Working on creating IV&V procedures to validate security remediations and a standard way to classify systems that will be in compliance with NIST.	30%	Green
		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

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34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>			
		4/5/2004	Continue providing ITA/EAI support to FSA Business Units.	50%	Green
		3/19/2004	No changers to report	10%	Green
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, & Federal policies, regulations, statutes.</i>			
		4/5/2004	Continuing on schedule. Resfresh is 80% complete.	35%	Green
		3/19/2004	Technology Refresh and EITS Report Portal: Continuing on schedule.	33%	Green
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>			
		4/5/2004	Transfer of funds document (Amendment 09) is with ED Budget (Larry Kean) and ED Finance (Faith Ford). QA Team expects document to be approved and obligated week of April 5. CSB (QASP) in final draft form and ready for addition to CSB - SOW. CSB IV&V support strategy on track. Post-Implementation Review for Financial Partners Data Mart, Release 2 and 3 delivered by PerotSystems. QA Team is reviewing for acceptance. Status of acquisition for security support to COD team and IV&V support to EAI&ITA remains unchanged. Procurement still bogged down in GSA/FEDSIM contracting office. FEDSIM Senior Management now energized to expedite.	50%	Green
		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
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>			
		4/5/2004	On March 30, the eLoans team met with SBA's agency lead and SBA and ED General Counsel representatives to resolve a few issues with the MOU. All issues have been resolved, and SBA is moving the MOU forward for signature. All other eLoans partner agencies have signed the FY04 MOU. Ketchum Communications presented its recommendations for the GovLoans outreach focus and message to the GovLoans working group on March 31, and is coordinating its planning with the GovBenefits outreach team by preparing an overall outreach plan for approval by the GovLoans team. Students.gov successfully migrated into the Websphere 5.0 production environment running on new HP servers (it had been running on Websphere 3.5 on Sun servers) and cut over to the new domain name server (DNS) without a single problem. As of March 29, 14,881 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov. The April edition was mailed on March 30th.	50%	Green
		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

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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>			
		4/2/2004	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 1.70 (through 3/26/04)	50%	Green
		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
41	CMS	<i>Plan and manage FSA conferences.</i>			
		4/5/2004	Spring Conference & associated workshops took place the last week of March. -Registered attendees at +1,300; Actual attendees 1,165 -There were 31 sessions offered -Sec. Paige gave keynote address -Next steps: Analyze evaluations for future conferences -Prepare for NASFAA conference	95%	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
		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
42	CMS	<i>Manage, develop and update content for FSANet.</i>			

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		<p>4/2/2004 For the month of March: New updates to FSAnet content and structure have been completed. FSA Assists (replaces Rumor Mill) goes live April 18th.</p> <p>WEB STATS: -Successful hits for the entire site=382,987; -Average hits per day=12,354; -Home page hits=4,171; -Average Visits=8,176; -Average visits per day=263; -Most active date=March 29th; -Most active day of the week=Monday; and -Most active hour of the day=9am-10am</p> <p>The top 5 sections hit on FSAnet: Home Page, IT Security Portal, Career Zone, FSA Reorg, and Rumor Mill (unavailable page)</p> <p>Most downloaded files: Modernization Task Orders & Deliverables.</p>		50%	Green
		<p>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.</p>		45%	Green
43	CMS	<p><i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i></p> <p>4/2/2004 Controlled Mail - 208 letters were handled by FSA and all are on time.</p> <p>FOIA - Rec'd 9 new FOIA cases and closed out 14 cases.</p>		50%	Green
		<p>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.</p>		45%	Green
44	CMS	<p><i>Develop and implement internal and external communications strategy.</i></p>			

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		4/5/2004	<ul style="list-style-type: none"> -VNR still running. Over 6 million viewers. -Video w/ FSAU re: new employee video ongoing. Filming was done in NYC at Spring Conference with six FAAs and two students. -Lobby monitor reflects Dashboard stats of 04/01. -March FSA Now is now out. -FSA Weekly News to employees on time. -Secretary's Weekly Report on time. -Information Request Tracking - As of Dec. 03, 165 total requests, 20 open and 1 on hold. -Daily newsclips ongoing and on time. -Providing input to the Customer Service Review Board (CSRB) re: types of requests. -Supported FSA Spring Conference. 	50%	Green
		3/19/2004	<ul style="list-style-type: none"> -VNR was completed and disseminated Mar. 9, 2004. Current tracking data: 152 airings; 104 stations; 77 markets; 5.9 million viewers!!! -Industry Awards: Nominated SAOTW for Exec.Gov's Gracie Award for technical and customer excellence; Nominated the FSAIC, CCSC & Ombudsman's call centers for the Gov. Customer Support Award focused on customer service excellence. -Working with HR & 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. -Lobby monitor reflects current (03/18) Dashboard data. -Greentree interviewed Keith Wilson re: Data Strategy. Look for it in the GG's May issue under "Tax Dollars At Work." -Entrance Counseling Guide for Direct Loan Borrowers is under editorial review in OPA. Should be printed in April. -Draft flow charts of the pubs process are being created. -28 information requests received in March and 13 have been answered. -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. -FSA Weekly News and the Secretary's Weekly News continues to be completely on time. 	45%	Green
45	EPMS		<i>Mature Enterprise-wide Procurement Plan.</i>		
		4/2/2004	<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 new deadline for ASI is April 15, 2004 for the senior management demonstration and May 3, 2004 for implementation on the Ed network. The Department of Education placed the requirement of putting the EWPPDb in the Technical Review Board process, resulting in a month extension for full implementation on the network. 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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46	EPMS	<i>Develop acquisition workforce.</i>			
		4/2/2004	The acquisition workforce includes APCMG, contracting officers on detail to FSA, and the program managers serviced by APCMG. The training plan for APCMG staff has been approved and training is being scheduled. A corresponding training evaluation process has been developed to track the effectiveness, timeliness, and job application of each training event. The staff will complete 11% of their overall training during March (32 days), and 26% during April (74 days). 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.	50%	Green
		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
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>			
		4/2/2004	The Enterprise Process is still being established. Contractor support has been engaged to identify the existing measures and processes being used on FSA contracts. Significant effort is required over the next six months to accomplish this task. At the present progress rate the task is at risk and management is in the process of evaluating a methodology for maximizing efforts to get this task on a positive path.	25%	Yellow
		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
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			
		4/2/2004	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%	Yellow

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49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>				
		4/2/2004	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.	50%	Green	
		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	
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>				
		4/1/2004	Continuing to roll FSA projects into PMO reporting structure in conjunction with status reporting during weekly IPC meetings. Anticipate during the month of April that 6 additional projects will begin reporting on a routine basis via the monthly scorecard.	25%	Green	
		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>				
		4/1/2004	No updates since last report. Status remains yellow as SLC project within FSA on hold awaiting outcome of One ED SLC project.	08%	Yellow	
		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>				
		4/1/2004	Evaluation of proposals in progress and on target for selection or or before 4/15/04. Current integration contract, Accenture Task Order 153, extended through May 04. Contract modification was awarded 3/24/04.	50%	Green	
		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	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i> <i>Comments</i>		
53	EPMS	<p><i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i></p> <p>4/5/2004 General FSA management and staff continue to meet with GAO and provide information as requested. The oversight of school participants is still our greatest area of concern in the high-risk plan and requires continued management attention.</p> <p>Financial Management The FY 2004 financial statement audit meetings continue, with emphasis on the need to provide E&Y information, data and systems access requested to meeting a November 1 deadline. The IPC was briefed on FSA's Oracle 11i implementation approach. Requirments gathering sessions are ongoing in FSA. An important part of the risk mitigation strategy will be a proof of concept of the one-system strategy to ensure that it has the capacity to more than adequately support FSA's processing volume. The project's overall score is yellow because FSA's costs have not been clearly allocated, the risks have yet to be detailed under the Department's recently awarded project management contract, and the final award of FSA's task order for upgrade support has not been made but is now in process in Contracts. The Statement of Objectives and Government Cost Estimate for internal control reviews of FSA's financial systems have been delivered to Contracts and work continues on the Request for Proposal.</p> <p>Systems Integration Regular work group meetings occurred during the reporting period in several Data Strategy 2.0 areas: FFEL Data Flows, Student Enrollment Data Flows, Common Data Architecture Operating Guidelines Options Analysis, and Enterprise Analytics Architecture Options Analysis. The final FEBI Phase 1 RFP containing origination and disbursement requirements was released 3/26/04. FSA's Enterprise Architect completed EA overview discussions with GAO.</p> <p>Program Integrity An April 1 alert memorandum from OIG about FSA audits on administrative stay is cause for some concern, although the findings should not be sufficient to affect GAO's high-risk decision. Nonetheless, timely management decisions on audit recommendations are critical to program integrity, as is appropriate use of administrative stays. FSA received OMB clearance for ezAudit for 6 months and continues to register schools and process submissions. FSA is on track to meet our default recovery goal of 9.5%. The spring conference included program integrity sessions on such topics as reconciliation of program funds, verification requirements, default aversion initiatives and techniques for reducing delinquency.</p> <p>PBO Management CFO has responded to GAO's questions regarding the ABC model. Award of a contract to finalize the 2002 and 2003 cost accounting models and develop baseline 2002 unit costs is expected this month. A Human Capital Management Plan status report is being prepared and should be provided to GAO by 4/7/04. When Congress returns from their Easter break, FSA will sent the five-year plan to them as well as the higher education community for comment.</p>	50%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>	<i>%Complete</i>	<i>Status</i>
		<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>		46%	Green
54	AWSS	<p><i>Deliver workforce development and support programs.</i></p> <p>4/2/2004 Three out of the four milestones for this project are 50% complete or more. Will continue to provide superior services and support programs to the FSA workforce.</p>		55%	Green
55	AWSS	<p><i>Perform facilities management activities.</i></p> <p>4/2/2004 Three out of the four milestones have now been completed. Success measures have been met and we are continuing to work on records management and transit and parking issues to improve the working environment of FSA employees.</p>		90%	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>		
		4/1/2004	FSA CFO has continued to work with Budget Service, OCFO, and OPE to complete draft deliverables due through March 31. The sub-groups have continued to coordinate with FSA business owners as needed.	12%	Green
		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
57	CFO		<i>Develop trial balance capability for COD and CSB (operating partners) to facilitate and expedite the reconciliation process.</i>		
		4/1/2004	Request for cancellation will be addressed @ IPC on April 7th	10%	Green
		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.	10%	Green
58	CFO		<i>Support the implementation of Oracle Federal Financials Release 11i.</i>		
		4/1/2004	FSA CFO has approved the skill mix for the FSA 11i support contract. The EDS proposal is in the process of being approved and awarded by Contracts.	43%	Green
			FSA CFO continues to conduct Oracle 11i JAD sessions with each of the business/operating partners. The Oracle 11i team is now consolidating requirements into a draft requirements matrix. This requirement matrix will be validated with further meetings with business/operating partners.		
			The Department-wide Oracle 11i team is preparing for the team kickoff meeting on April 14th. Planning for the meeting is well underway.		
			The Department-wide Program Management contract has been awarded to CMSI. The IV&V and Integration contracts is still awaiting final award in early April.		
		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"> · The EDS proposal is being approved by Contracts and will be awarded upon the CFO's approval of the skill mix. · 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. · 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. 	39%	Green
59	CFO		<i>Implement automated budget funding entry solution.</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>			
		4/1/2004	The EDCAPS task order for this initiative has been awarded and an initial kick-off meeting has occurred. Initial meetings with users have been scheduled to gather more detailed technical requirements. Consolidated status reporting will commence once the FMS task order has been awarded. The FMS proposal has been accepted and we are now awaiting final award by Contracts.	22%	Green	
		3/19/2004	Continuing to work with contracting officers to finalize awards with EDCAPS contractor (IBM) and FMS contractor (EDS).	21%	Green	
60	CFO	<i>Implement Forms 2000 additional enhancements.</i>				
		4/1/2004	Production migration is planned for this weekend (April 3rd). Plans to transition the code and the user procedures are final and have been communicated to the FMS Operations staff. Production migration validation will occur the week following migration, as planned in the project schedule. No deviations from schedule or budget have occurred.	95%	Green	
			Conversion to be complete on Monday, April 5, 2004. GA's have been reminded to not access the monthly and monthly/quarterly reports during this time.			
		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	
61	CIO	<i>Implement Enterprise Data Strategy initiatives.</i>				
		4/6/2004	Deliverable 152.1.7 - XML Core Component Dictionary Release 2.0 was delivered on time to FSA. We are currently reviewing the deliverable. Will begin implementation of the Prioritization Phase of the Data Quality Methodology by prioritizing the remaining Mad Dog issues and assigning them for assessment.	28%	Green	
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>				
		4/5/2004	Reports for this item are included in the milestones.	25%	Green	
		3/19/2004	Progress reports for this item is included in the milestones.	25%	Green	
63	ADS	<i>Improve school partner oversight.</i>				
		4/2/2004	Progress continues on remaining milestones 63.1, 63.2, 63.6, and 63.8. See milestones for details.	50%	Green	
		3/19/2004	Continued progress on all remaining milestones. See 63.1, 63.2, 63.6, and 63.8 for details.	47%	Green	
65	ADS	<i>Create a target state vision of a Front End Business Integration (FEBI).</i>				
		4/2/2004	Front End Business Integration (FEBI) Phase 1 solicitation posted on FedBizOpps (www.fedbizopps.gov) and FEBI web site (www.febi.ed.gov) on 03/25/04. Phase 1 source selection panel identified and the kickoff meeting was held on 03/27/04. Project overview was presented at the FSA Software Developers Conference on 03/31/04. FEBI pre bidders conference will be held on 04/06/04.	50%	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>		
		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
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
67	ADS		<i>Prepare to implement IRS data match.</i>		
		4/2/2004	On Friday, March 19, 2004, members of the IRS Match workgroup previewed to the Management Council the IRS Match general session that will be presented at the Spring Conference in New York City. In addition, the IRS Workgroup has identified six key steps in implementing an IRS match and developed five possible implementation approaches. As a follow up to the presentation on 3/19/04, the workgroup plans to present this information to the Management Council in April 2004.	75%	Green
		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.		
68	AWSS		<i>Continue Learning Coupon program.</i>		
		4/2/2004	As of 3/31/04, 114 coupons have been processed (23% of goal of 45% of FSA employees) and \$43,836 obligated (21.6% of goal of 90% of funds budgeted.) Still waiting on VDC to roll out new database first weekend in April.	20%	Green
69	AWSS		<i>Provide Career Zone services.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
				4/2/2004	The Career Zone has offered a total of 25 workshops with over 200 staff attending courses from October 2003 to March 2004. Evaluations of the Career Zone offerings indicate an average 4.35 on a 5 point scale with 5 being outstanding and 1 being poor. The Career Management component has provided 17 out of the 25 workshops, and average an exceptional 4.71 on a 5 point scale. Staff evaluated the 1-on-1 Career Management Counseling service as 4.1 on a 5 point scale. Thus far, the Career Zone has established a Career Management database with 75 new clients. During the Career Zone's first full month of operations in March, 138 staff utilized the developmental services. The library continues to be an important asset to the growth and visibility of the Career Zone. The number of visits to the library has more than doubled since introduction in February. The Skill Scan Assessment tool was introduced in March and received outstanding feedback from staff. The addition of the Brown Bag Book Club has generated enthusiasm from participants and provides the Career Zone staff the opportunity to engage FSA staff in conversations regarding career management. On the horizon, in April the Career Zone will introduce a Brown Bag Video workshop, Keys to Reaching Your Full Potential, and will expand our assessment tools.	75%	Green
				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
70	ADS	<i>Increase Student Financial Aid program awareness.</i>		4/2/2004	Student Aid Awareness (SAA) has received DSG and IPC approval to move forward with four major initiatives: 1) Contract for the development of performance metrics for aid awareness strategies; 2) Contract for assistance with the establishment of the National Consortium for national coverage; 3) Media contract for the first year of a new one-year base plus four option years for radio and web services to implement FSA's long-term communications strategy; 4) Pilot program that places ads promoting FSA programs in national Native American periodicals. In addition, SAA is developing plans to conduct market research to determine industry best practices.	25%	Green
				3/19/2004	All supporting projects are progressing on schedule.	20%	Green
71	ADS	<i>Reengineer EDEExpress.</i>		4/2/2004	Acceptance testing for Return to Title IV Funds began on March 15, 2004. While testing on the Customer Requirements Allocation Document (CRAD) is on schedule, we are in the process of completing a System of Records Notice 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.	95%	Yellow

<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	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	
73	CIO	<i>Develop FSA Security and Privacy Architecture Pilot.</i>				
		4/5/2004	Received and accepted accenture deliverable 143.1.2, identifying pros and cons for vendor selection	65%	Green	
		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	
74	AWSS	<i>Implement Leadership Excellence development training.</i>				
		4/5/2004	No report available. 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	

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.					
				4/2/2004	SAA participated in 9 continuing partnership activities - March 19 &20 discussed federal financial aid during the 5th Feria Educativa held at the University of New Mexico in Albuquerque. March 19 participated in the Ronald E. McNair Post-Baccalaureate Achievement Program Conference panel discussion on using Student Aid on the Web to find funding for graduate school. March 21 participated in the 24th Annual Policy Seminar held by the Financial Aid Subcommittee of the Council for Opportunity in Education; discussed/exchanged ideas about the best ways to simplify, integrate, and deliver services to diverse populations. March 31 participated in the second HUD Neighborhood Networks Regional Technical Assistance Workshops in Phoenix, Arizona. March 24 (White Plains, NY) , 26 (NYC), 30 (Boston), and 31 (New Haven, CT.) disseminated information at the National Scholarship Service College Fairs. March 28 participated in the Memphis, TN. NACAC College Fair.	100%	Complete	
				3/19/2004	SAA participated in 7continuing 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 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.	100%	Complete	
			1.2	Publish accurate and timely information that meets the needs of our audience.				
				4/2/2004	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. We are proceeding with the Guide and Funding as is, pending usability studies. GPO will be contacted to discuss design work for these publications.	10 %	Green	

Milestone# Action Item

Status Date Comments %Complete Status

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

1.3 Disseminate information directly to target audience.

4/2/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 4/2/04, SAA has provided federal student aid information and distributed materials to approximately 62,019 persons as follows: 60 % Green

March 19, 2004	McNair Conference	300
March 19-20, 2004	Feria Education College Fair	1,600
March 21, 2004	Financial Aid Subcommittee	25
March 24, 2004	White Plains, NY College Fair	900
March 26, 2004	New York, NY College Fair	450
March 28, 2004	Memphis, TN College Fair	500
March 30, 2004	Boston, MA College Fair	500
March 31, 2004	New Haven, CT College Fair	700
April 1-2, 2004	Prince George's County College Fair	1,000

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

1.4 Respond accurately and timely to requests.

4/2/2004 For the period 3/15/04 –3/26/04, the Editorial Services Contract responded to the following correspondence: 99 % Green

101 controls--- (56 prior period)-----turnaround (3 days)=99%
 3,944 non-controls--- (2,839 prior period) —turnaround (2 days)=4%
 2,400 e-mails--- (2,090 prior period)-----turnaround (2 days)=100%

* The temporary anomaly that more than quadrupled the non-control mail received at ESC over the past few months will soon cease. The priority service given to control mail and emails has steadily been maintained.

Milestone# Action Item

Status Date Comments %Complete Status

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

1.5 Reach customers through Student Aid on the Web.

4/2/2004 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 (03-14- to 03-27-04) are 810,188 and 13,288,140 respectively. During the same period last fiscal year we had 216,609 visits and 7,060,439 hits. This represents FY04 increases of 274% for visits and 88.2% 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 26,728 new accounts for the FY04 year to date. The MyFSA feature was not available last fiscal year. 100% Complete

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

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

2.1 Monitor customer feedback to improve services.

4/2/2004	CCSC continues to make progress in 3 areas identified for improvement:	50 %	Green
	(1) Promoting IFAP Subscription Service -- Our March numbers for the volume of IFAP Subscribers will not be known for a few more days, but we expect another increase due to enrollments at the Spring Conference. Since we last reported, we also added a link to the IFAP Subscription mailing list on our IFAP home page, which may also cause a slight increase in our numbers.		
	(2) Assisting the EZ Audit Staff -- Our new, simplified Lotus Notes system has been implemented. We have also updated our Automated Call Distribution greeting for our toll-free service to include an option for the EZ Audit Staff.		
	(3) Replace IFAP Search Engine -- The time frame was moved from prior to the Spring Conference to sometime after. OCIO is in the process of reinstalling the Google appliance correctly at the VDC.		
	CCSC has identified two new areas for improvement:		
	(4) We have begun to post COD's Friday Processing Updates to IFAP in order for them to go out on our Saturday night subscription service.		
	(5) FSA's Default Management Website has been moved into the IFAP family of websites and has been updated to contain FSA's new website look and feel. Default Management has updated its Website to incorporate more user-friendly features and expanded content and is designed to provide the most frequently requested data and information for a variety of website visitors in an organized and common-sense way.		
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.		

4 ADS Provide EDEXpress application modules.

4.2 Release Common Origination & Disbursement module.

4/2/2004	The PRR for the 2004 2005 EDEXpress Release 2.0, which includes Pell and Direct Loan modules was held on March 26, 2004. The software will be posted on April 5, 2004. With this posting the project will be complete.	99 %	Yellow
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<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	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, EDEXpress needed to make some changes to correctly identify the student based on Original SSN as EDEXpress 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 EDEXpress 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	96 %	Yellow
5	ADS	<i>Process Pell and Direct Loan transactions through the Common Origination & 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
		5.2	Issue COD SOO.					
					4/2/2004	Final FEBI Phase 1 RFP containing Origination and Disbursement requirements was released on March 26, 2004. Proposals are do by April 15, 2004.	67 %	Green
					3/19/2004	RFI comments were received on 3/8/2004. Final RFP is on schedule for release on 3/31/2004.	62 %	Green
6	ADS	<i>Administer Campus-Based (eCB) activities.</i>						
		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
		6.4	Issue final awards to schools.					
					4/2/2004	Final awards were issued to schools on 3/23/2004.	100%	Complete
					3/19/2004	On track to issue final awards on 3/23/2004.	80 %	Green
		6.5	Issue FISAP software release.					

<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>
					4/2/2004	New software testing continues on track.	67 %	Green
					3/19/2004	Testing of new software continues on track for release by 6/30/2004.	62 %	Green
8	ADS	<i>Expand eZAudit initiative.</i>						
		8.1	Commence Contract Start-up.					
					4/2/2004	FSA has received OMB forms clearance for e-Zaudit for 6-months, through 9-30-04. In addition, OMB has indicated that they will approve a 3-year clearance upon receipt of our forms clearance package. Enhancements were implemented for A-133 schools.	50 %	Green
					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
		8.2	Complete first full cycle of processing (all school types).					
					4/2/2004	As of 4-1-04, we have rec'd 1860 annual submissions, of which 1360 have passed the QC screening, or a 73% acceptance rate.	20 %	Yellow
					3/19/2004	45% of audits rec'd between 4/1/03 and present have been successfully processed.	45 %	Green
		8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.					
					4/2/2004	As of 4-1-04, 2391 of 5660 schools have registered, which is 42% of all schools.	42 %	Green
					3/19/2004	As of March 14, 2004, 2517 schools have registered.	10 %	Green
9	ADS	<i>Enhance program monitoring and oversight.</i>						
		9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year.					

4/2/2004 For the biweekly period 3-15-04 to 3-28-04, 88% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. The biweekly % has increased from the previous reporting period, but is still below the 95% goal. The decrease was due to a recent policy position from OGC on processing paper audits. 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. FSA still is receiving some audits in paper and we are working with schools to get all schools to submit their audits through eZ-Audit as the current regulation requires. FSA is working on the second backlog of paper audits. The cumulative resolution process itself is still within an acceptable timeframe.

We are working diligently to stabilize and increase the efficiency of eZaudit.

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.

We are working diligently to stabilize and increase the efficiency of eZaudit.

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

4/2/2004 We will request a data extract for the second quarter and prepare compliance measure. We are continuing our analysis of potential areas of non-compliance. We will append IAM data as add'l info for the Teams. The Administrative Actions & Appeals Division has received 27 referrals for administrative action and initiated 13 debarments from 10-01-03 through 3-31-04.

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.

9.3 Conduct School Relations initiatives.

4/1/2004 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.

The School Relations Branch continues to go forward with all the assignments that were previously stated. However, we have completed some additional task in the last week. At the Spring Conference in New York, we had a Direct Loan Day conference for all the Direct Loan Schools and the schools stated that they wanted to have more days like this one. We also had a Focus Group for all Historical Black Colleges and Universities to discuss their issues as well as a Career College Day. So we are still working hard with our schools to make sure that they are provided with what they need in order to provide assist to their students.

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			9.4	Conduct the Experimental Sites initiative.				
					4/1/2004	The number of 2002-03 annual reports received has increased to: 116 received (96%). Four (4) of the original 12 extensions remain open.	60 %	Green
			9.5	Administer the Quality Assurance program.				
					4/1/2004	Work for both Phase 1 and Phase 2 of the ISIR Analysis Tool continues and remains on schedule for delivery in June 2004 and October 2004, respectively.	60 %	Green
			9.6	Conduct vulnerability assessment.				
					4/2/2004	All interim work continues on track.	20 %	Green
					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

10 **ADS** *Produce school publications and materials.*

			10.1	Annually update and disseminate the Federal Student Aid Handbook.				
					4/5/2004	The percentage has slipped because it was overestimated the previous run. Application / Verification Guide - Posted on IFAP, text sent to GPO for printing. Volume 2: School Eligibility and Operations - Posted on IFAP, text sent to GPO for printing. Volume 1: Student Eligibility - incorporating final comments from PLI and OPE Volume 3: Calculating Awards and Packaging - circulated for FSA review, still waiting for comments from OPE and PLI Volume 4: Processing Aid & Managing FSA Funds - circulated for FSA review, still waiting for comments from OPE and P Volume 5: Overawards, Overpayments, and Withdrawal Calculations - in development Volume 6: Campus-Based Programs - circulated for FSA review, still waiting for comments from OPE and PLI	55 %	Green
			10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.				

4/2/2004	Exit Guides arrived at the warehouse and orders are being fulfilled. The Direct Loan Bulletin announcing the guides went out on March 22, 2004.	50 %	Green
	The Entrance Counseling Guide will be submitted for a print bid next week. The design specifications require an April 30, 2004 delivery date, and we will start distributing the guides to the schools shortly thereafter. A Direct Loan Bulletin will be prepared to announce the details once we have a print contract in place and the delivery dates confirmed.		
	The DL Basics and DL PLUS Basics brochures are now in draft form and will be circulated for technical review next week. We are hoping to have these brochures printed in the next month or so.		
	There are only eight back-ordered requests for publications or documents at the warehouse, and they are for the DL PLUS Basics brochure.		
3/19/2004	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.	47 %	Green
	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.		
	The DL Basics and DL PLUS Basics brochures are being revised.		
	There are only two back-ordered requests for publications or documents at the warehouse, and they are for the DL PLUS Basics brochure.		

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.

4/5/2004	Non-consolidated totals reached record totals for the month and year-to-date. Total non-consolidation loan recoveries were \$781.9 million, an increase of 34 percent over the same period, March 31, 2003, last year.	57 %	Green
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

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

4/5/2004	A meeting of the Default Management Workgroup will be scheduled for the week of April 12. At that time we will provide a status update and decide on next steps.	20 %	Green
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

<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>
			13.3	Complete the work on the implementation of the life-time default rate measure.				
					4/5/2004	The Risk Management Group has developed a draft measure for cohort years 1994 and 1995 of the Direct Loan portfolio. Review with the General Manager of Borrower Services is pending. OIG has been provided a write-up of the initiative related to the development of the Lifetime Default Rate (LTDR).	35 %	Green
					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
			13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.				
					4/5/2004	The Risk Management Group has developed a draft measure for cohort years 1994 and 1995 for the Direct Loan portfolio. Review with the General Manager of Borrower Services is pending. OIG has been provided a write-up of the initiative related to the development of the Lifetime Default Rate (LTDR).	35 %	Green
					4/5/2004	This cure rate for defaulted loans is reported monthly. The next report for this item will be submitted April 16.	50 %	Green
					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.				
					4/5/2004	Staff has completed the exit review for the FISMA audit and will incorporate the necessary changes for DLSS to CSB.	50 %	Green
					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
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.				
					4/2/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green

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	3/19/2004	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.			
	4/2/2004	The next LPIF calculation is scheduled for Saturday, 5.15.2004.	45 %	Green
	3/19/2004	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.			
	4/2/2004	The February benchmark reports were reviewed and distributed. The edit passage rates for the Guaranty agencies remain high, with a 98.86% passage rate.	45 %	Green
	3/19/2004	The February benchmark reports were reviewed and distributed. The edit passage rates for the Guaranty agencies remain high, with a 98.86% passage rate.	45 %	Green
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes.			
	3/19/2004	Completed.	100%	Complete
16.5	Participate in the formulation of school cohort default rate initiatives.			
	4/2/2004	The final documentation included the detail design document and updated NSLDS program specifications. Completion date of programming was Friday, 2.13.2004 and completion of documentation was Wednesday, 3.24.2004.	100%	Green
	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
16.6	Provide monitoring functionality of GA and lender reasonability on a monthly basis.			
	4/2/2004	Currently the NSLDS staff is working on putting together a business case for the remainder of the work for this project. NSLDS is also working on obtaining a cost estimate from the contractor. A request to modify the Scheduled Completion Date will be submitted to the Investment Planning Committee. The revised Scheduled Completion Date is 9.30.2004. The Success Measures should be revised to read: "Provide monitoring functionality of GA and lender reasonability on a monthly basis upon implementation of reporting process."	50 %	Green

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					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
			16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP.				
					3/19/2004	Completed.	100%	Complete
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.				
					4/2/2004	The contract was successfully transitioned on Wednesday 3.31.2004. The NSLDS team is currently reviewing all documentation and plans to close this item out in the next reporting period.	100%	Green
					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
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.				
					4/2/2004	An Enhancement/Improvement Report has been developed. This report will be used to gather new requirements at a high level. Report submitted.	45 %	Green
					3/19/2004	QC for the March 15th load was not performed due to a FMS data issue.	15 %	Green
			19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes.				
					4/2/2004	The design and implementation of a consolidated lender scorecard is dependent on necessary changes to the existing lender scorecard. Lender scorecard changes are currently being determined. Quarterly Report submitted.	40 %	Green
					3/19/2004	FP Management provided comments based on review of the Consolidated Lender Scorecard Report to ensure all requirement are addressed.	22 %	Green
			19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.				

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					4/2/2004	While verifying and validating data received from FMS it was discovered that FMS did not run their script against the most recent 50 % data. This issue has been resolved. Monthly QC (Validation/Verification) report submitted.	50 %	Green
					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
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>						
		20.1	Monitor and evaluate web page hits to drive future postings to portal.					
					4/2/2004	Results of the first three months top visits/download files have been submitted. NSLDS and Interest/T-bill pages have the most activity for the first three months. Will continue to monitor the Portal activity.	45 %	Green
					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
		20.2	Maintain current and relevant information to financial partners' user community.					
					4/2/2004	Continue verifying and validating Direct Loan and FFEL school data. After data is validated a deployment date will be schedule. Content Management Matrix report submitted.	40 %	Green
					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
		20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.					
					4/2/2004	The Focus Group conference call is scheduled for Wednesday, 4.7.2004. Agenda items include: updates on recent changes to the Portal, Calendar feature, What's New section, Current Activities, open discussion on what works and what doesn't, and recommendations for changes.	35 %	Green
					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
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.					

4/2/2004 On Wednesday, 3.24.2004, the States were sent an E-announcement informing them of the upcoming award year application cycle and tentative awarding information. For the States that remain in non-compliance, an additional notification was sent informing them of the impact that continued non-compliance would have on their future tentative awards. To be eligible for awards, States must be in compliance or regain compliance (if they did not participate in current award year) before they can continue in the program. 100% Green

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. Green

21.2 Prepare and submit clearance paperwork.

4/2/2004 FP Staff received additional OMB update emails confirming that the approval of the LEAP/SLEAP application is continuing through the approval process and that it is on target for approval before the April 2005 drop-dead date. 95 % Green

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

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

4/2/2004 The deadline dates notice has been through Departmental clearance. Currently, the notice is awaiting publication in the Federal Register. To receive 2004-2005 funding, applications are due from the states by Friday, 5.28.2004. FP has also completed a review of its internal procedures to ensure that paper applications are processed in a timely manner. 30 % Green

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

22 FPS Perform Voluntary Flexible Agreement (VFA) activities.

22.1 Perform cost neutrality analysis and provide results.

4/2/2004 Cost neutrality recommendations for the California Student Assistance Corporation (CSAC), American Student Assistance (ASA), and Great Lakes Higher Educations Guaranty Corporation (GLHEC) are ready for CFO review. A meeting is tentatively scheduled for Monday, 4.5.2004. Savings proposals from the Texas Guaranteed Student Loan Corporation (TG) are to be received by 4.2.2004 and TG has confirmed that they are on schedule. 80 % Green

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

22.2 Prepare performance measure assessment and benchmarking reports.

4/2/2004 The draft Colorado VFA agreement has been updated to reflect specific monthly performance measures, the information that Colorado must provide on a monthly basis, and the impacts of not meeting performance targets associated with performance based fees. If approved, this agreement can serve as a model for future and existing VFA agreements by establishing specific contractual performance measures, frequency and type of reporting, and impacts associated with not meeting the established performance criteria. This approach will also lay the foundation for monitoring, oversight, and reporting on VFA performance. 50 % Green

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

22.3 Evaluate new applications for VFA.

4/2/2004 A draft document of the process steps used to date on Colorado was completed on Wednesday, 3.24.2004. The process, with efficiency adjustments, stands at 40 business days for internal ED processing and guarantor negotiations, 30 days for the legislated Congressional review period, for a total of 70 business days from beginning to end. Although additional efficiency gains may be able to be incorporated as the process is tracked in preparation for the 9.30.2004 Annual Report, other areas may expand due to conservative estimates and/or resource allocation. 70 % Green

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

22.4 Foster effective working relations with guaranty agencies during scheduled site visits.

4/2/2004 FP continued to develop effective working relationships with the VFA guarantors regarding the cost neutrality discussions over the past two weeks, the ongoing negotiations with Colorado regarding their proposed VFA agreement, and with the industry. Face to Face meetings include the United Student Aid Funds (USAF) on Wednesday, 3.31.2004 and the American Student Assistance (ASA) meeting with Terri Shaw on Friday, 4.2.2004. 60 % Green

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					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
23	FPS	<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>						
		23.1	As appropriate integrate ERM work with other FSA business units. Identify opportunities to integrate at the enterprise level.					
			4/2/2004	FP Workgroup and staff provided list of issues/problems with respect to FP's usage of ERM. The issues are as follows: 1) Need to secure Optika 4 upgrade; 2) Need to secure Workflow Management tool (an integrated application); 3) Add new categories to the current FP file index and 4) Identify and correct misfiled documents (occurred during back-file conversion by contractors).	45 %	Green		
			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		
		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.					
			4/2/2004	Now that FP issues/problems have been identified, the FP work plan will be updated to reflect the issues.	40 %	Green		
			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		
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.					

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	4/2/2004	Ernst & Young (E&Y) is in the process of determining GA site visits based on part of FP provided data. Once site visits are determined, FP will begin to coordinate E&Y audit with GAs.	30 %	Green
	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
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.			
	4/2/2004	Have recently completed the GA review for Texas and ACS the Servicer. On-going this week is the GA review for NELA (Washington).	30 %	Green
	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
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.			
	4/2/2004	Review process ongoing. A-133 reviews and lender audits are being received for the period ended FY03. Follow-up is still being conducted in response to questions from lenders.	75 %	Green
	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
25.4	Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.			
	4/2/2004	Contractor has started working on improving the Lender scorecard. This activity will allow multiple lenders to be evaluated at the same time.	40 %	Green
	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
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI) process. Define Financial Partners Channel's role in CRI.			

<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
			25.6	Conduct vulnerability assessment.				
					4/2/2004	A risk assessment was completed on NSLDS a few years ago. We are reviewing this past assessment to determine areas to be covered for this new action item. Success measures will be provided in the next reporting period.	05 %	Green
					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
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>						
			37.1	Release GovLoans Gateway, a plain speak web site that educates citizens with links to federal agency and private-sector resources.				
					4/5/2004	Ketchum Communications presented its recommendations for the GovLoans outreach focus and message to the GovLoans working group on March 31, and is coordinating its planning with the GovBenefits outreach team by preparing an overall outreach plan for approval by the GovLoans team.	50 %	Green
					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
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>						
			45.1	Complete market research to resolve plan issues.				
					4/2/2004	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
					3/19/2004	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
			45.2	Synch Plan w/BIG End State Vision.				

<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>
					4/2/2004	After market research is complete, decisions on procurement execution will be incorporated in the plan.	50 %	Green
					3/19/2004	After market research is complete, decisions on procurement execution will be incorporated in the plan.	20 %	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>						
		47.1	Incorporate CSB into enterprise process.					
					4/2/2004	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. At the present progress rate the task is at risk and management is in the process of evaluating a methodology for maximizing efforts to get this task on a positive path.	25 %	Yellow
					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
		47.2	Incorporation of FEBI into process by September 30, 2004.					
					4/2/2004	The Enterprise Process is still being established. The Front End Business Initiative (FEBI) is still in the early stages of acquisition. By September 30, 2004, the process will incorporate FEBI to the stage that FEBI has achieved on that date. The rating is changed from green to yellow until progress accomplishment equals to the time remaining to accomplish the task.	25 %	Yellow
					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: <ul style="list-style-type: none"> ·Action Item - Change Incorporate Integrated Front-end Delivery System (REDS) into enterprise process to read: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> o Incorporation of FEBI into process by September 30, 2004. 	70 %	Yellow
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>						
		48.1	Establish monitoring and reporting process for government furnished property.					
					4/2/2004	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.	100%	Green

	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
48.2	Establish reporting process to monitor vendor performance.			
	4/2/2004	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. A process can be established with that contractor support by September 30, 2004. Full implementation of the process and reporting vendor performance will extend beyond September 2004.	10 %	Yellow
	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

49 EPMS Increase contract dollars awarded to small businesses.

49.1	Increase dollars awarded directly to small businesses.			
	4/2/2004	Milestone deleted.	100%	Cancelled
	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.			
	4/2/2004	Milestone deleted.	100%	Cancelled
	3/19/2004	Per IPC's approval, this milestone has been cancelled.	00 %	Cancelled

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		<i>Milestone# Action Item</i>				
			3/19/2004	This milestone was deleted.	100%	Green
54	AWSS	Deliver workforce development and support programs.				
		54.1 Continue Intern Program.				
			4/2/2004	FSA Summer 2004 Intern Program is currently accepting and reviewing applications for the Summer Program. Thus far, we have received over 500 resumes from prospective students interested in participating in the FSA Intern Program. Twelve students have been selected for the 25 Intern slots available for the Summer Program. Every principal office within FSA has requested an Intern for the summer. There has been a high demand for students in the technology/computer field with an emphasis on web development skills. We will continue the recruitment process through the end of April. The Summer Program officially begins June 1st and ends August 6th.	70 %	Green
			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
		54.2 Conduct FSA Orientation.				
			4/5/2004	The FSA New Employee Orientation Program has conducted two quarterly classroom training sessions. The first training was held on December 9, 2003 and the second training was held on March 17, 2004. Two additional training sessions dates are scheduled for June 2, 2004 and September 1, 2004. Evaluations were completed by participants for each session. The average overall effective rate for the FSA New Employee Orientation Program was 93% either good or great. 71% of the new employees who were new to FSA attended the program. The FSA video participants have been identified and interviews are scheduled to begin during the week of April 5, 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
		54.3 Implement results of One-ED Competitions.				
			4/2/2004	There has been no indication that any of the One ED performance award decisions will be made anytime soon. Staff within FSA Human Resources were recently supplemented by the hiring of an Intern Program coordinator and stands ready to implement changes resulting from the One ED performance and decisions.	00 %	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>
					3/22/2004	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
			54.4	Update Skills Catalog/Learning Tracks.				
					4/2/2004	We're currently updating School Eligibility, School Delivery (Relations and Title IV Delivery) sections of the skills catalog. We will then send them back to each division for final approval. We're waiting to get comments back from CIO. We're also trying to get on the Students' Channel's calendar for a final review. We are also working on a timeline for the rest of these business units so that we can better track their progress. In addition, we have a meeting with Borrower Services on 4/15/04 to get their final comments. We will also add the SES Competencies to our catalog to allow better alignment with our organization.	50 %	Green
			54.5	Implement Workforce Alignment Strategy.				
					4/2/2004	Significant progress has been made in the resolution of issues that required resolution in the development of a reorganization package for ASEDS. We have completed our initial mapping of all employees from the "as-is" organizational structure to the "to-be" organization and will present staffing patterns to the ASEDS management council during the week of 4/5/04 for confirmation. Communications to ASEDS employees regarding our pursuit of early retirement and buyouts have been sent out and both employee and union reaction appears to be positive. We anticipate that we will soon be in a position to discuss an early draft of the reorganization package with representatives from the Office of Management.	50 %	Green
					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
			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	<i>Perform facilities management activities.</i>						
			55.3	Administer records management.				
					4/2/2004	During this reporting period, OCIO has conducted records management interviews with the records management contacts for COO, School Eligibility Channel, CIO, Communications, and Workforce Support Services. Currently 95% of FSA's organization has been interviewed. After each interview, a Records Classification form is to be completed by each organization. Thus far, 50% of the reports have been submitted for review and approval by OCIO and NARA.	90 %	Green
			55.4	Coordinate the distribution of the Transit Benefit program.				

<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>
					4/2/2004	Survey has been completed and has been sent to FSA employees on 4/2/04. This project has been reported as completed.	100%	Complete
61	CIO	<i>Implement Enterprise Data Strategy initiatives.</i>						
		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.					
			4/5/2004	Held kick-off meeting on 3/24 for deliverable 152.1.1 (FFEL and Student Enrollment Data Flow Option Analysis)			25 %	Green
			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
		61.8	Conduct market research to validate the feasibility of the target conceptual design (Option D).					
			4/6/2004	Complete			100%	Complete
			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
		61.9	Develop the detail Data Quality Execution Plan.					
			4/5/2004	No Change			25 %	Green
			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
		61.10	Develop a holistic XML Management Plan.					
			4/5/2004	No Change			25 %	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>
		<i>Milestone# Action Item</i>				
			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
		61.11 Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.				
			4/5/2004	No change	35 %	Green
			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	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>				
		62.2 Begin implementing Phase 1 of the FSA-approved transition plan.				
			4/5/2004	Contracts -- FSA is reviewing cost issues related to CSB software licensing, incentives and carryover legacy tasks to determine whether contract modifications may be necessary. Development -- Nothing new to report. Infrastructure -- User applicability and licensing costs are still being defined. Operations -- Nothing new to report. Oversight -- Nothing new to report.	25 %	Green
			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
63	ADS	<i>Improve school partner oversight.</i>				
		63.1 Implement Integrated Partner Management (IPM) system.				

Milestone# Action Item

Status Date Comments %Complete Status

4/2/2004 All work related to IPMS competitive bid continues on track. See milestones 63.2 and 63.6 for details. 55 % Green

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

63.2 Develop Consolidated requirements for IPM system.

4/2/2004 Non-Case Management Deliverable was completed and accepted by COR/PMO (Debbie Bairdane) on 3/15/2004. 87 % Green
 Financial Partner Eligibility and Oversight As-Is Flow Documentation has been completed and will be recommended for acceptance by COR/PMO (Debbie Bairdane) on 4/5/2004.

3/19/2004 Both deliverables were revised and resubmitted. 80 % 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.

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

4/2/2004 Progress continues on two work requests for IPMS for a conceptual design to be awarded to the ILSC. ILSC contract award is still on track for the end of April 2004. 55 % Green

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. 51 % Green

63.8 Procure the design of a workflow tool for SEC.

4/2/2004 Discussion/consideration in conjunction with FEBI and Data Strategy teams continues and is on track. 50 % Green

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.

	4/2/2004	Student Aid Awareness (SAA) is developing plans and allocating resources to conduct market research.	20 %	Green
	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
70.2	Develop and implement long-term mass marketing strategy.			
	4/2/2004	Business proposal was approved. Statement of Objectives (SOO) for media campaign has been submitted to FSA Contracts for posting and we anticipate an award by July 2004. IPC approved funding to contract for performance measures baseline development.	25 %	Green
	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

71 ADS Reengineer EDEExpress.

71.3 Implement Return to Title IV Web Release.

	4/2/2004	Acceptance testing for Return to Title IV Funds began on March 15, 2004 on the Customer Requirements Allocation Document (CRAD). These are the agreed upon requirements are this testing is on schedule. While testing is on schedule, we are in the process of completing a System of Records Notice (Notice) that will postpone the release of the software to the Web until late June or early July. In addition, we have identified some key issues around regulatory guidance that was provided subsequent to the release of the PC software. We wish consider adding them to this release. Since the schedule is extended to meet the needs of the Notice, we may request some additional time to build and test these requirements. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product 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 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 until late June or early July because of the Notice's required processing time.	99 %	Yellow
	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 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 until late June or early July because of the SORN's required processing time.	90 %	Yellow