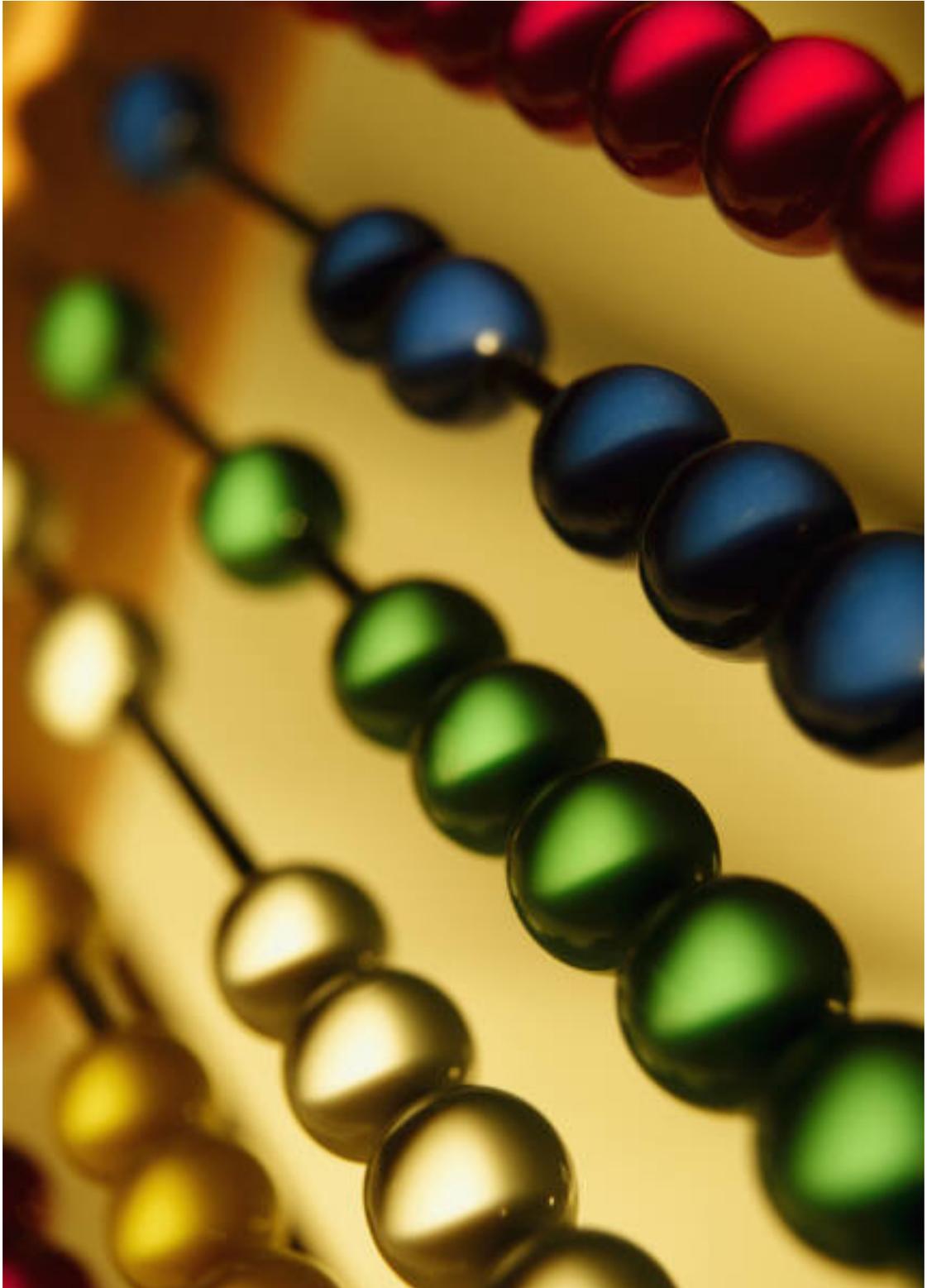


Bi-Weekly Report as of June 25, 2004



FSA Performance Plan – FY2004

SUMMARY

COMPLETED

- Financial Partners and SEC successfully completed the recommended enhancements to the Electronic Records Management (ERM) system. These tasks were based on prioritizing the recommendations according to staff needs, feasibility, and dollar amount. This completes Project 23 (*Perform maintenance and improvements to the Financial Partners' ERM system in order to enhance use.*)

RED LIGHT

- In order to enhance financial management, reviews of internal controls were to be performed this fiscal year on FMS and CSB. The contract for this initiative has not been awarded. If the contract is awarded by the end of June, an internal control review on FMS may be completed by mid-to-late October. This initiative now requires management intervention to ensure the contracting effort receives the priority it needs to be awarded by June 30. (*Project 27 – Perform internal control reviews to enhance financial management*)
- Project 51 (*Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle)*) continues to be reported as Red. This Project may need to be re-scoped as it is on hold pending the outcome of One ED.

YELLOW LIGHT

- Proposals received for the Reconciliation Reengineering Project did not meet CFO requirements. To date, solicitation has been limited to firms classified as “small.” Such firms do not have the qualifications required to fully meet the objectives of the Project. CFO has requested that the competition for support for this Project be opened to all firms. (*Project 29 – Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.*)
- Project 40 (*Policy Liaison Placeholder*) is in the process of being specified. The Policy Director is to meet with the COO to obtain final approval on language. The proposed language is “FSA will develop procedures to ensure a timely response to policy questions.”
- Several Projects continue to be reported as Yellow:
 - Project 8: Expand eZAudit initiative.
 - Project 10: Produce school publications and materials.
 - Project 45: Mature enterprise-wide procurement plan.
 - Project 47: Implement enterprise contract performance monitoring measures against new systems contract awards.
 - Project 48: Continuously update and monitor procurement controls.

Project 68: Continue learning coupon program.
Project 71: Reengineer EDEExpress.

GREEN LIGHT

- Three of the five Guaranty Agency (GA) site visits selected for the Ernst & Young audit are completed. The Vermont GA site visit began June 1 and the New Mexico GA site visit began June 7. These are the final two site visits to be performed. (*Project 25 – FP: Enhance program monitoring and oversight*)

CANCELLED

- With the approval of the IPC, Project 72 (*Develop a Late Disbursement Approval and Tracking System*) is cancelled for FY 2004. It has been determined that automating this process is not cost effective. In addition, this process is being successfully performed manually.

ACTION PLAN STATUS AT A GLANCE

as of June 25, 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 June 25, 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 June 25, 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 June 25, 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 June 25, 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)	cancelled
67	PREPARE TO IMPLEMENT IRS DATA MATCH	G
68	CONTINUE LEARNING COUPON PROGRAM	Y
69	PROVIDE CAREER ZONE SERVICES	G
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	G
70.2	Develop and implement long-term mass marketing strategy	NR
71	RE-ENGINEER EExpress	G
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	G
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	cancelled
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	G
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

Key:

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

FSA Project Status Report

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status_Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
1	ADS	<i>Implement student aid awareness initiatives.</i>	6/25/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04. Met with Pathways to College Network officials June 24th and June 25th to pursue partnering for the common goal. The Pathways to College Network is an alliance of 34 national organizations and funders focusing research-based knowledge and resources on improving college preparation, access, and success for underserved groups, including low-income students, underrepresented minorities, first-generation students, and students with disabilities. Through our collective efforts, the Network expects to change perceptions, practices, and policies about academic preparation and college opportunity; eliminate policy and programmatic barriers to college going; and make readiness for college success a fundamental goal of public education in the United States.	50%	Green
			6/10/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04. Detailed write-ups will be provided for the report due at the end of the third quarter.	50%	Green
2	ADS	<i>Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).</i>	6/25/2004	Progress continues in all identified areas. Of particular note, CSCC added a Spanish script so that callers to the center now have the choice of hearing the greetings and options in Spanish.	73%	Green
			6/11/2004	Continued progress in the identified areas. Of particular note, the EZ Audit transition has been completed, and IFAP subscription at the end of May 2004 was at all time high with 5,119 subscribers.	70%	Green
5	ADS	<i>Process Pell and Direct Loan transactions through the Common Origination & Disbursement (COD) system.</i>	6/11/2004	Remaining milestone 5.2 has been completed. The final FEBI Phase 2 RFP was issued on 6/1/2004. Proposals are due by 7/6/2004.	100	Completed
6	ADS	<i>Administer Campus-Based (eCB) activities.</i>	6/25/2004	FISAP testing continues and will be completed by 6/24/2004. We are on track to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.	88%	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>		
		6/11/2004	<p>On 6/2/2004, the IPC approved the requested extension in the target completion date for Project 6 and Milestone 6.5 from 6/30/2004 to 7/30/2004. (Earlier this year when we revamped the milestones under Project 6, we neglected to extend the target end date for this milestone (and accordingly, for the project) from 6/30/2004 to 7/30/2004. The project plan for the FISAP software has always projected the release of the software on 7/12/2004; there has been no delay in completing the project or extension of an earlier release date for any reason. Additionally, the 7/12/2004 scheduled release date is well before the Master Calendar required release date of August 1st.)</p> <p>At this time, FISAP testing is progressing. We expect to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.</p>	84%	Green
8	ADS		<i>Expand eZAudit initiative.</i>		
		6/25/2004	<p>Contract award is on track. Streamlined QC procedures have been developed and implemented. Metrics have been identified and are being gathered to address OMB requirements and DRCC oversight. School registrations are at 70% of domestic schools.</p> <p>We anticipate going to QC sampling and the project going to green within the next 45 days.</p>	75%	Yellow
		6/11/2004	<p>Registration process is on track. We are identifying and developing all of OMB requirements that are a prerequisite for obtaining full forms clearance for the project. We are streamlining the QC process. We will continue to monitor this project closely to determine when this project should go to green.</p>	73%	Yellow
9	ADS		<i>Enhance program monitoring and oversight.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status_Date</i>	<i>Comments</i>		
		6/25/2004	<p>Milestone 1 For the biweekly period 6-07-04 to 6-21-04, 88% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely.</p> <p>Milestone 2 Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 25%. 603 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,753 on 6/13/2004.</p> <p>Training materials for the other compliance initiatives will be ready July 9, with training of trainers scheduled for July 27 -29.</p> <p>Milestone 3: HBCu Perkins analysis began</p> <p>Milestone 4: Group continues to analyze the data submitted by Experimental Sites Schools</p> <p>Milestone 5: William Leith, Deputy Director of Application Processing, signed off on Phase I of the ISIR Analysis Tool, which will be available to schools by June 30</p> <p>Milestone 6: The team leader continues to meet with subject matter experts in the area of school eligibility, oversight, and systems processing. The team leader has also researched the common data architecture deliverables on data quality, security, and privacy and is meeting with subject matter experts about identified vulnerabilities and mitigation strategies. Additional research, and interviews with subject matter experts are planned for the next reporting period.</p>	68%	Green
		6/9/2004	<p>Milestone 1 For the biweekly period 5-24-04 to 6-06-04, 80% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely.</p> <p>Milestone 2 For the FY 2004 Compliance Initiative, preparation of training materials is on schedule. Training is scheduled for July 27 - 29. This was the earliest available time to get conf rms.</p> <p>Milestone 3: HBCU, H SI, and Tribally Controlled institutions mailing list has been completed for internal use.</p> <p>Milestone 4: Experimental Sites continues to analyze the data submitted by Experimental Sites Schools</p> <p>Milestone 5: Expect to sign-off on (accept) the Phase I final ISIR Analysis Tool by June 24</p> <p>Milestone 6: The team leader for the vulnerability assessment work has gathered and reviewed OIG and GAO reports about ASEDs internal controls and business process vulnerabilities. The team leader is gathering business process and system documentation and is meeting this week with school identifier Subject Matter Experts (SMEs) about school application process risks and vulnerabilities.</p>	65%	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>
10	ADS		<i>Produce school publications and materials.</i>		
		6/25/2004	Milestone 1: Volume 6 posted on IFAP put this milestone back on target turning the project level back to green. Milestone 2: The Basics brochures continue to progress through the development phase. The Direct Loan PLUS Basics brochure is completing final FSA review and will go to OPA for review shortly. There are 42 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.	72%	Green
		6/9/2004	Milestone 1: The delay in the handbook caused some minor stagnation. It is expected to go back to green as soon as this portion of the handbook goes live. Milestone 2: The Basics brochures are progressing through the development phase. The Direct Loan PLUS Basics brochure is completing final FSA review and will go to OPA for review shortly. There are 35 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.	65%	Yellow
11	ADS		<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>		
		6/24/2004	--Award new training contract by April 2004. Awaiting contract award, which is now expected by July 1. Panel has completed all its work and on June 2, made its recommendations to the Contracting Officer. --Implement new registration system by March 2004. --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." --Since the new registration system is live and running, no more reports on that will be given.	80%	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>			
6/14/2004		<p>--Award new training contract by April 2004.</p> <p>Contract award now expected by June 15. Panel has completed all its work and on June 2, made its recommendations to the Contracting Officer.</p> <p>--Implement new registration system by March 2004.</p> <p>The new system went "live" on May 28.</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. Data for Electronic Application Processing training will be compiled after these sessions end in April."</p>	80%	Green
13	BS	<p><i>Enhance program monitoring and oversight.</i></p> <p>6/25/2004 Total non-consolidation recoveries have now reached \$1.216 Billion, an increase of 25 percent from the same period, June 18th, in FY03.</p> <p>The Default Management Workgroup meeting was held June 22. The goal for the meeting was to reach consensus and finalize the changes.</p> <p>The Lifetime Default Rate analysis has on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio has been completed. The analysis on the FFELP portfolio for the same cohorts has begun. The Risk Management Team will be working with NSLDS staff to develop the SQL for extracting NSLDS data for this analysis.</p> <p>The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new schedule. Once the plan is complete, Borrower Services staff will review it for final approval. This plan will be used for the assessment for the rest of 2004.</p>	72%	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>		
		6/8/2004	<p>Total non-consolidation recoveries reached \$1.109 billion, an increase of 25 percent from the same period, end of May, in FY03. This represents 6.97 percent of the FY04 portfolio balance.</p> <p>The Default Management Workgroup meeting has been rescheduled for June 22. The Group has updated the inventory and modified definitions of the overarching strategies as needed. The goal for the meeting on the 22nd will be to reach consensus and finalize the changes.</p> <p>The Lifetime Default Rate analysis has begun on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio. The next step will be to apply the analysis to the FFELP portfolio. That analysis will begin after the training is completed for the staff on NSLDS.</p> <p>The cure rate for May 2004 was 59.3 percent, an increase of 4.2 percent over the 55.1 percent goal for FY2004.</p> <p>The independent Verification and Validation (IV&V) team is working on the project plan to align it with the new schedule. The team is also doing a final review of the risk items that will be reviewed for FY04 and beyond.</p>	69%	Green
14	BS		<p><i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i></p> <p>6/25/2004 The CSB web team is continuing review of the comments from the May 27th demonstration. The development schedule for the site is on track and the completion date for Phase one, as scheduled, will be October 8, 2004. The Loan Consolidation web site will be integrated into the new CSB site at the completion of phase one. Once the new CSB site is launched, borrowers will have the ability to transfer between the Direct Loan Servicing site and the Loan Consolidation site without re-entering their personal identifiers.</p> <p>Certification of the Spanish language Loan Consolidation Website is complete. The new site will be launched July 1, 2004.</p> <p>6/8/2004 A demonstration of the new CSB website was held Thursday, May 27, 2004. Comments and suggestions were received from FSA staff. The CSB web team is reviewing the comments to determine which changes should be incorporated. The completion date is scheduled for October 8, 2004.</p> <p>A Spanish language Loan Consolidation Website is undergoing final certification. It has been installed in the model office and independent quality control unit (IQCUI). Testing began on June 7, 2004 and will take approximately one week.</p>	75%	Green
15	BS		<p><i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i></p> <p>6/25/2004 The statistics for Loan Consolidation overpayments and underpayments are released monthly. The next report on this item will be issued mid-July.</p>	60%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			<i>%Complete</i>	<i>Status</i>
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		6/8/2004	The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for April. The target for overpayments for May was \$2,265,585; the actual dollar amount was \$2,006,661. The target for under payments for May was \$778,092; the actual dollar amount was \$669,059. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month thru September 30, 2004.		70%	Green
16	FPS	<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>				
		6/25/2004	NSLDS Maintenance and Operations Activities operating efficiently. May benchmarks were reviewed and distributed. The proposal for GA and Lender reasonability was accepted and is awaiting contract review board approval.		83%	Green
		6/11/2004	NSLDS Maintenance and Operations Activities operating efficiently. May benchmarks were reviewed and distributed. A proposal for monthly GA and Lender Reasonability was received and is under review.		82%	Green
19	FPS	<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>				
		6/25/2004	The contractor continues to made changes to the data mart. The FSA Data Mart team has tested several outstanding SIR.		83%	Green
		6/11/2004	Several issues were resolved this reporting period. FP Operations Staff has requested FY01 and FY02 data from FMS.		78%	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>				
		6/25/2004	The contractor is researching the "Whats New" page limitation. The team continues to make updates.		92%	Green
		6/11/2004	No internal/external issues received this month. All May reports are provided with this update.		88%	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>				
		6/25/2004	Applications from 48 of 56 potential entities have been received to date for the 2004-2005 LEAP/SLEAP award year; of those received, 36 have been processed and approved to date. The remaining applications shall be processed and grant awards will be made by the 7.1.2004 deadline. FP staff is still on track for meeting this deadline, barring any unforeseen technical difficulties with any of ED Network systems (i.e., GAPS).		90%	Green
		6/11/2004	Applications from 33 of 56 potential entities have been received to date for the 2004-2005 LEAP/SLEAP award year. Financial Partners Services used their NASSGAP presentation time on Tuesday, 5.25.2004 to re-enforce the current deadline of Friday, 5.28.2004 and address questions and issues that have prevented some states from submitting their applications. The most common issue appears to be staff turnover at the state level and their lack of understanding of the process.		84%	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>				

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		6/25/2004	The costing model that is used to evaluate cost neutrality was reviewed with OMB on Monday, 6.14.2004 and FSA received concurrence on its use. Communication of the results with the VFA guarantors is in process and it is being incorporated into the development/reporting of VFA benchmarking measures. Due to a transition in staffing on the VFA team, the draft document for the VFA evaluation of new proposals was not forwarded the week of June 14th as expected. It will be forwarded for comment on Friday, 6.25.2004. In the meantime, the first steps of the draft process were executed for a new VFA proposal that was received by Financial Partner Services and the timeframes identified with the Colorado evaluation are being tested with the new proposal.	92%	Green
		6/11/2004	The results and recommendations from the Cost Neutrality Analysis were reviewed, as scheduled, with Sally Stroup and Terri Shaw. The costing model used as the base for this analysis will be reviewed with OMB on Monday, 6.14.2004. If OMB concurs with the approach that FSA has taken, then the results of the analysis will be shared with the individual VFA guarantors and the appropriate next steps will be taken to ensure cost neutrality for the existing VFA's. FPS is moving forward with developing a draft performance measure benchmarking report for distribution and comment. Process steps for evaluating a new VFA have been incorporated into the draft process document for the "transmittal to Congress" phase and this document will be distributed for comments the week of June 14th.	91%	Green
23	FPS		<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>		
		6/25/2004	FP completed and submitted recommendations for improvements to the current ERM system in April 2004. Likewise, FP and SEC consolidated its recommendations into one spreadsheet "ERM System Enhancement Matrix". Based on the priorities within each Channel, the recommendations were prioritized according to staff needs, feasibility and dollar amount. Based on discussions with ERM (contractor), a Project Charter was created to address and provide timetables and completion dates for the "immediate tasks". This action item was successfully completed on Monday, 5.31.2004. As follow up, documentation was submitted to support the activities and closure of this action item.	100	Completed
		6/11/2004	ECMC provided FP and SEC with a revised Configuration Management Plan as well as updated FP and SEC Project Charter. The Project Charter identifies plan for completing all identified improvements to system.	90%	Green
25	FPS		<i>Enhance program monitoring and oversight.</i>		
		6/25/2004	? Ernst & Young (E&Y) has completed all five scheduled GA site visits. E&Y is now reviewing site visit results to determine if what official findings need to be reported. FP continues to assist E&Y. ? The South Carolina program review was concluded and the review of the Rhode Island guaranty agency was started. An updated Compilation of Lender and Servicer Review Findings and Observations Report was issued. ? The proposed meeting in Washington, DC for the Power User group and contractor support staff to conduct a team review of the Lender and GA scorecards was instead accomplished via conference calls. Team leads will prepare a supplemental section to aid with the validation of performance metrics. ? The contractor's NSLDS vulnerability assessment proposal was accepted by FSA. Continue to wait for award by Contracts Office.	70%	Green

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		6/11/2004	<p>> Three of the five GA sites visits selected for the Ernst & Young (E&Y) audit are now completed. Balance of GA data is being received. The Vermont GA site visit began Tuesday, 6.1.2003. The New Mexico E&Y site visit began Monday, 6.7.2003.</p> <p>> One national review team conducted a program review of Nelnet's Indiana Service Center, and a second review team is concluding a review at the South Carolina guaranty agency.</p> <p>> A meeting is being planned for the Power User group and contractor support staff to conduct a team review of the Lender and GA scorecards to assess the quality of the product and determine if any other issues need to be addressed.</p> <p>> The contractor proposal for the NSLDS vulnerability assessment accepted. Now waiting for Contracts Office to award.</p>	65%	Green
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>			
		6/24/2004	All Guaranty Agency site visits are complete and follow-up documentation is being collected. CFO office is preparing for a very large Provided by Client (PBC) demand in July.	40%	Green
		6/10/2004	The financial statement audit is well under way, as many significant Provided-by-Client (PBC) items have been turned over to the auditors. All Guaranty Agency (GA) site visits will be complete by close of business 6/10/04.	30%	Green
27	CFO	<i>Perform internal control reviews to enhance financial management.</i>			
		6/24/2004	Panel has been established and review of proposals commenced on June 24,2004.	20%	Red
		6/10/2004	The Internal Control Review RFP was released to potential bidders. FSA held a pre-bidders conference to answer bidder questions and provide more detailed information to assist bidders. The SOO and IGCE was sent to contracts on 3/24. While there have been numerous reasons for the delay, we are still in the process of awarding a contract for this initiative. Originally, we were planning on performing an internal control review on FMS and CSB during this fiscal year. If the contract is awarded by the end of June, we may be able to complete an internal control review on FMS by mid-to-late October. Given the delay in awarding a contract, this initiative now requires management intervention to ensure that the contracting effort receives the priority it needs to be awarded by June 30. This issue will be brought up at the next IPC.	19%	Red
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>			
		6/24/2004	CFO has changed the approach to produce the FY2003 ABC model by the end of July and the FY2002 model by the end of September. The ABC team loaded the resource data into the model and has begun to re-set resource assignments and allocations. CFO will present initial findings to FSA management on July 1st, with a presentation to the Management Council scheduled on July 9th.	36%	Green
		6/10/2004	Reconciliation of ABC data to the Status of Funds and Statement of Net Cost for FY2002 and FY2003 is complete. The team is now working to input the new data into the model, allocating costs per the previously drafted allocation methodology. Initial presentations to senior management are planned for the end of June. Also, nearly all steering committee members have been identified. Once steering committee membership is finalized, regular monthly steering committee meetings will be scheduled.	33%	Green

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29	CFO	<p><i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i></p> <p>6/24/2004 Monthly Reconciliations: Reconciliations are being performed and completed on time (less than 20 days compared to 30-day metrix).</p> <p>Reconciliation Reengineering Project: Proposals received from vendors, as of 4-30-04, in response to FSA's request for additional clarification of approach level of effort estimate did not meet CFO requirements. To date, solicitation has been limited to financial consulting firms on the GSA schedule classified as "small". Such firms do not have the firm and staff qualifications required to fully meet the objectives of the reconciliation reengineering project based upon pre-solicitation market research performed by the Accounting Division (AD) and evaluation of proposals received in response to original and revised RFPs that were limited to firms classified as "small". The AD has confirmed requirements and approach and desires to open competition to include firms classified as "other". Financial Management Group/AD has decided to use a BPA to acquire the process reengineering services required. Work with Contracts has begun to determine if existing Department BPA is an appropriate contracting vehicle.</p> <p>Desk Operating Procedures: Six of the eight desk operating reconciliation procedures have been finalized. Received revised draft from Deva for one of the two remaining procedures and began review.</p> <p>Other: Production Environment - Decided on production environment architecture and initiated procurement process to obtain necessary hardware and technical contractor support. Pilot program reconciliations include (1) DLS to DCS transfers and (2) FMS/FMSS reconciliations. The status is as follows: 1) Completed testing of DLS to DCS transfers reconciliation and initiated process to maintain this reconciliation beginning June 1 in the staging environment until the production environment is available late July to mid-August; and 2) Initiated process to enable Deva to FTP FMS and FMSS sample data to the CheckFree staging server to begin the development of the CheckFree FMS to FMSS reconciliation. Next steps to implement the Production environment are (1) to assign and finalize support (i.e., application, database, system security officer) functions; and (2) develop functional and technical implementation plan.</p>	38%	Yellow

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		6/10/2004	<p>Monthly Reconciliations: Reconciliations are being performed and completed on time (less than 25 days compared to 30 day metric).</p> <p>Reconciliation Reengineering Project: Proposals received from vendors as of 4-30-04 in response to FSA's request for additional clarification of approach level of effort estimate did not meet CFO requirements. To date, solicitation has been limited to financial consulting firms on the GSA scheduled classified as "small". Such firms do not have the firm and staff qualifications required to fully meet the objectives of the reconciliation reengineering project based upon pre-solicitation market research performed by Accounting Division (AD) and evaluation of proposals received in response to original and revised RFPs that were limited to firms classified as "small". AD has confirmed its requirements and approach and desires to open competition to include firms classified as "other".</p> <p>Desk Operating Procedures: Six of the eight desk operating reconciliation procedures have been finalized. Deva is currently working on resolving FSA comments on the two remaining procedures.</p> <p>Other: Established connectivity to VDC and tested limited CheckFree functionality on FSA test desktop. Rolled-out CheckFree client software to remaining 4 FSA computers for users included in the CheckFree pilot program. Currently analyzing the options for production support with FSA-CIO. Next steps are (1) to assign and finalize support (i.e., application, database, system security officer) functions and (2) develop functional and technical implementation plan.</p>	35%	Yellow
30	CFO		<p><i>Manage FMS operations.</i></p> <p>6/24/2004 FMS Operations continues to operate smoothly.</p> <p>6/10/2004 There are 23 metrics that the contractor can be penalized, including the following categories of measurements: transaction processing times, monthly closing times, change request management, application configuration management, security procedures, help desk operations, and overall management measurements. EDS met all metric targets for the month of May.</p>	70%	Green
31	CIO		<p><i>Develop and deploy Enterprise Performance Test Architecture.</i></p> <p>6/25/2004 Work is progressing on the 5 performance tests in progress. All testing activities are on schedule.</p> <p>6/14/2004 Working through team set up issues including replacement of a damaged computer for one team member. Load runner has been installed on all machines. The controller is setup. Additional memory for the controller has been ordered. The team is working with the eMPN team to establish a testing schedule and identify business scenarios. The team is also establishing a schedule for continuing the research of the FAFSA GC issue.</p>	20%	Green
32	CIO		<p><i>Provide Enterprise and Data Architecture management.</i></p>		

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		6/25/2004	The EA Team is archiving all documentation that currently makes up the Technology Handbook into Clearcase before restructuring the material into a Technology Library to be accessed from the EA Website and Tech Center drop-down on FSA.net. FSA / ED EA teams are meeting to discuss revisions to the ED EA documentation and synchronize our approach for meeting OMB's requirements for consolidated EA Business Case and EA documentation submission. FSA EA / DA Teams are meeting to discuss functionality to be added to Popkin based on its upcoming release of iRMA. EA continues to support the EPMS Team by providing guidance on the PRM / BRM alignment for each application in support of the Exhibit 300 submission.	42%	Green	
		6/18/2004	The EA Team submitted two additional questions to OMB related to a) properly aligning Education to the BRM in support of the Exhibit 300 submission and b) consolidating the ED and FSA EAs into one Exhibit 300. EA met with the ISLC team to discuss Data Management. ISLC will deliver a recommendation back to EA on whether Embarcadero or ERwin should be used for Data Management support at FSA. Also met with ISLC and Diana O'Hara discussing where the EA Governance fits into the ISLC Change Management process. Discussions will continue.	42%	Green	
		6/14/2004	The EA team completed all of the outstanding Architecture Reviews of Business Cases, created individual Review Reports for each Business Owner as well as an overall Summary EA Review Report to be presented to the Architecture Working Group. Also reviewed the OMB Exhibit 300 and 53 feedback for FY'05 in preparation for FY'06 and presented issues to the Enterprise Performance Management Services team. EA reproduced OMB reference model reports (provided in the feedback) using Applix/TM1 - FSA is now able to look at the data submitted as part of the Exhibit 300 submission in the same fashion as OMB. Started tool evaluations comparing Erwin, Sybase and Popkin in the areas of Data Modeling and other capabilities.	42%	Green	
33	CIO	<i>Provide security and privacy support to FSA business units.</i>				
		6/25/2004	Continuing FISMA reporting work and validation activities associated with C&A activities.	80%	Green	
		6/18/2004	Working with systems to validate POA&M statuses for continued C&A work. Provided comments to ED/OCIO/IA that identified concerns for timeline and scope for continued C&A efforts. Working with systems to complete NIST Self-Assessments as part of our annual FISMA reporting. Assisting CSB with requirements for P3P implementation.	75%	Green	
		6/14/2004	In discussion with ED Contracts and reworking boilerplate contract content for security. Discussed patch management strategy with VDC management and need for pilot. In process of scheduling VDC site visit. Working with FSA systems to complete annual Self-Assessments as part of FISMA.	75%	Green	
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>				
		6/25/2004	ITA responded to two service requests and one production support request. It was determined that the production problem was not within ITA. EAI responded to 24 COD customer service inquiries. The team is making preparations for eMPN's migration into the ITA environment. Schools Portal, Financial Partners Portal, and Student Aid on the Web are undergoing application reviews to ensure "best practices" are used by the application teams. We expect to migrate these applications from WebSphere 3.5 to 5.0 by 8/1/04. The new target date for the Interwoven migration is the weekend of 6/25. All applications running under WAS 5.0 are now using CSS.	41%	Green	

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		6/18/2004	ITA: The Interwoven migration has been delayed while two technical problems are being addressed. CSS implementation continues as scheduled. WAS migration projects continue according to plan. ITA is working with the Performance Testing team to performance test the FAFSA application. ITA is supporting eMPN during their migration into ITA. During the period, ITA responded to two ITA support tickets.	41%	Green
		6/14/2004	The ITA Team, in addition to responding to customer service inquiries, made progress on several ongoing projects. The team continues with the plan to make WebSphere 5.1 upgrade; work proceeds on schedule to migrate the remaining applications that use WebSphere 3.5 to 5.0. On the Interwoven front, Indus has requested that the migration to 5.5.2 be moved up one week to the weekend 6/11-6/13. On the CSS project, everything is on schedule. Production support was focused in the beginning of the week on the problem with an Oracle listener for the temp app database for FAFSA. This problem brought up a number of issues, not the least of which was why the problem was allowed to persist for so long before it was escalated to the support teams.	41%	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>			
		6/25/2004	QA Team is preparing the final FY04 GSA/FEDSIM transfer of funds document for review by Contract Officer (Deb Wrabley) by June 25. The money will fund an optional performance period for COD Security Support and two additional months of ERM Operations Processing. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	73%	Green
		6/18/2004	QA Team accepted delivery of Post-Implementation Review (PIR) for Data Strategy, Release 1 investment. QA Team has also initiated a vendor re-compete for the PIR support task through GSA/FEDSIM, with selection anticipated by September 30, 2004. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	71%	Green
		6/9/2004	The QA Team is researching how to establish repeatable Return on Investment (ROI) metrics for QA activities (IV&V, Security Assessments, PIR) and coordinating with FSA (CSB, PMO, FSA Contracts) and Industry (FEDSIM, BSC Systems) representatives to discuss options and possible recommendations. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	69%	Green
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>			
		6/25/2004	The GovLoans interagency working group met on June 23 to discuss GovLoans outreach, content, and the usability tests scheduled for June 29-30. Kath Straub from Human Factors International discussed her approach to conducting the usability tests. The Federal E-Authentication initiative issued a government-wide "data call" for information on systems that are considered "major" under the Federal Information Security Management Act (FISMA). FSA CIO staff have completed efforts to pre-fill requested information on FSA systems. A request to validate and to complete the FSA data call was issued to system owners and system security officers this week. Students.gov received an estimated 59,702 visits during the week of June 13-19, 2004. Mark Seaman, Summer Intern for Students.gov, distributed a survey to all 35 of the FSA summer interns last week to get feedback about students.gov's content and usability. He will analyze the responses and we will use the results to improve Students.gov's usefulness to students.	73%	Green
		6/18/2004	On June 15, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. GovLoans.gov outreach has secured a link on FirstGov and has begun requesting links from other government and non-government web sites. As of June 14th, 15,033 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	71%	Green

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		6/18/2004	On June 15, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. GovLoans.gov outreach has secured a link on FirstGov and has begun requesting links from other government and non-government web sites. As of June 14th, 15,033 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	71%	Green
		6/9/2004	On June 7, the ED GovLoans team met with Marianna O'Brien to discuss possible outreach options for GovLoans. On June 8, the eLoans team held a follow-up conference call with OMB and HUD staff to discuss OMB's privacy/security concerns with the citizen access to CAIVRS prototype.	69%	Green
38	OMBD		<i>Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.</i>		
		6/25/2004	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 1.66 (through 06/18/04)	75%	Green
		6/11/2004	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 1.66 (through 06/04/04)	71%	Green
39	PL		<i>Conduct reauthorization activities.</i>		
		6/11/2004	Final FSA draft is expected to be delivered to Management Council by the end of June.	40%	Green
40	PL		<i>Policy Liaison Placeholder</i>		
		6/11/2004	This Project is in the process of being specified. Jeff Baker is to meet with Terri Shaw to obtain final approval on language. The proposed language is "FSA will develop procedures to ensure timely response to policy questions."	00%	Yellow
41	CMS		<i>Plan and manage FSA conferences.</i>		
		6/25/2004	-Two staffers are in New Orleans at the National Educational Computing Conference to oversee the set up of ED's booth and represent FSA with awareness as the main focus. -Work continues on development of new procedures for EAC session reviews.	97%	Green
		6/25/2004	Performance measure is completed. Time is needed to gather information that supports this performance measure	99%	Green
		6/11/2004	-Work continues on development of new procedures for EAC session reviews.	97%	Green
42	CMS		<i>Manage, develop and update content for FSANet.</i>		
		6/25/2004	-FSANet passed the IPC for funding for FY2005. -FSANet will launch FSA Assist on Monday, June 28. FSA Assist replaces the Rumor Mill. -Unable to get FSANet statistics due to server-related issues.	65%	Green

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		6/11/2004 WEB STATS for FSAnet for the month of May: -Successful hits for the entire site=434,797 **Note: Due to the network switching servers, FSAnet data was skewed and therefore only the above number was thought to be accurate. The top five areas hit most on FSAnet: Home Page, IT Security Portal, Learning Coupon, Career Zone, and FSA Reorganization Package. Most downloaded files: Moderization Task Orders & Deliverables.	65%	Green
43	CMS	<i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i>		
		6/25/2004 The top 5 main requests via controlled mail were: Complaint regarding defaulted loans; request for financial assistance; request for cancellation of student loans; inquiring on the status of consolidation application/conditional disability discharge application; and, interest rates too high on student loans and they since consolidated and the can't get a lower rate without a new loan. -There were 210 pieces of controlled mail answered. All are on time. FOIA cases - There were nine new cases and three closed cases.	65%	Green
		6/11/2004 Controlled Mail - 214 letters were handled by FSA - all on time. FOIA- For May, 3 new cases and 14 cases have been closed.	65%	Green
44	CMS	<i>Develop and implement internal and external communications strategy.</i>		
		6/25/2004 -Interview held with FSA's Bob Kling and the Orlando Sentinel on consolidation loans. Article forthcoming. -Hot media issues are Corinthian College and Career Education Corp. -Daily newsclips on time. -FSA Weekly News to employees on time. -Hot issues list to Sec. Paige on time. -Weekly Report to Sec. Paige on time. -Comms director visited Dallas and Denver regional offices with Terri Shaw. -Lobby monitor updated with current dashboard as of 6/24/04. -Information requests - To date, there have been 284 requests with 27 open and 1 on hold. The most recent requests are: Career Education Corp and the program review; Interview on consolidation and interest rates; Questions about how FSA audits schools, frequency, etc.	65%	Green

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		6/11/2004	-News article quoting Bill Leith in Bucks County Courier Times on FAFSA issues was received and disseminated through the newsclips. -News article quoting Neil Sattler in Federal Computer Week on e-signature was received and disseminated through the newsclips. -Daily newsclips on time. -FSA Weekly News to employees on time. -Hot Issues List to Sec. Paige on time. -Weekly Report to Sec. Paige on time. -Supported Terri Shaw by gathering information related to FSA's Hispanic outreach activities. -Lobby Monitor updated with current Dashboard. -Information Requests - To date, there have been 247 requests with 17 open and 1 on hold. The last 3 requests included: Info about an audit re: Pell Grants; Info needed for Asst. Sec. Karen Johnson on HBCUs; How are default rates calculated.	65%	Green
45	EPMS		<i>Mature Enterprise-wide Procurement Plan.</i>		
		6/30/2004	Project Completed.	100	Completed
		6/25/2004	The annual update of the Enterprise Procurement Plan was completed on 6/14/04.	75%	Yellow
			The EWPPDb is currently in limbo until it is determined whether the TRB process applies. Harry Feely has determined that it does not; waiting for ED concurrence. Save this requirement, all requirements to complete the plan are complete.		
			Percent complete is advanced due to the completion of the the Enterprise-wide Procurement Plan under 45.2.		
		6/11/2004	The EWPPDb is currently undergoing review by the Technical Review Board , resulting in a delay for full implementation on the network. It currently resides on the development network. The forecast of completing project number 45 overall objective is still achievable by the plan date of September 30, 2004. (Sixty percent completion status reflects the average completion between 45.1 and 45.2)	70%	Yellow
			Percent complete is advanced due to the near completion of the the Enterprise-wide Procurement Plan under 45.2.		
46	EPMS		<i>Develop acquisition workforce.</i>		
		6/25/2004	No change from last report.	60%	Green
		6/11/2004	No change from last reporting period.	60%	Green
47	EPMS		<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>		
		6/29/2004	The FEBI initiative has delayed the completion of this project until September 04 or beyond.	70%	Yellow
		6/25/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. No change from last reporting period.	70%	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>		
		6/11/2004	Training of CSB personnel was conducted on 05/27/04 to complete the CSB milestone. FEBI incorporation into the process is still dependent on the FEBI acquisition schedule.	70%	Yellow
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			
		6/25/2004	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.	75%	Yellow
			Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise.		
			Initial contract performance measures are complete.		
		6/11/2004	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.	70%	Yellow
			Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise. Establishment of contract performance measurement process has begun.		
49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>			
		6/25/2004	No change from last reporting period.	95%	Green
		6/11/2004	No change from last reporting period.	90%	Green
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>			
		6/25/2004	Continue to add FSA initiatives/projects into PMO oversight. Focus most recently has been on quality of reporting into PMO by current initiatives.	60%	Green
		6/9/2004	Continue to roll in targeted FSA projects into PMO reporting. During reporting period, added Portals (3) and Data Marts (2).	50%	Green
		6/8/2004	Continue to work with identified PM's in reporting into the PMO. Over last reporting period added the Portals (3) and Data Marts (2) into the monthly reporting structure. Project status reporting to the IPC should resume at the end of June once all FY05 business cases have been presented.	50%	Green
51	EPMS	<i>Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).</i>			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>		
		<i>Status</i>	<i>Date</i>	<i>Comments</i>			
			6/25/2004	No updates to report since last reporting period.	08%	Red	
			6/8/2004	No updates to report as this initiative is on hold pending the outcome of OneEd.	08%	Red	
52	EPMS	<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>					
			6/25/2004	Integration activities with new partner continue and draft integraton plan was received during this reporting period. However, percent complete remains unchanged as designated FSA staff have still not been named to the integration group.	70%	Green	
			6/9/2004	Transition from Accenture to new integration partner, Grant Thornton, is complete and integration planning acitivites are well underway. However, designated FSA integration group has not been named/created. This portion of the initiative is being considered the remaining 30% .	70%	Green	
53	EPMS	<i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</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>			
6/25/2004	General	<p>The exit conference on GAO's high risk review occurred on 6/22/04. OMB's point sheet for the meeting noted progress in all high risk areas and indicated areas in which FSA had not completed work or in which we need to improve. In all, the tenor of the meeting was very positive. FSA has followed up on several issues discussed by providing more documentation to GAO or by scheduling additional briefings. I expect that the draft audit report GAO delivers at the end of July will contain recommendations related to improving planning and reporting and to completing initiatives under way. The final report is scheduled for issuance on 9/10/04.</p> <p>Financial Management GAO noted significant progress made in this area, including resolution of several internal control weaknesses. They noted that the cost model is not yet operational. FSA's CFO will brief GAO on the cost model and on our improper payment estimations the week of 7/12/04.</p> <p>Systems Integration GAO noted that FSA has completed several critical tasks but that the process is not complete. FSA provided some additional information to GAO after the exit on the functionality of systems that have been eliminated in integration to date.</p> <p>Program Integrity In their exit interview discussion, GAO mentioned the lack of written procedures for comprehensive program reviews. ASEDs management explained that that is a process that is situational, not a review that is done the same way each time, and that there are handbooks and procedures for the activities that may be part of a comprehensive review. GAO already has a complete set of SEC procedures, and this issue has been discussed over the phone and via email many times in the past months. SEC provided additional historical documentation for GAO of the case management process and the training given to CMO staff. SEC is considering writing some high-level procedures to describe the steps shown in the Case Management Process flowchart and issuing them to staff as procedures. Something very similar was part of the Case Management rollout training years ago but is not part of the Program Review Handbook. GAO also asked about the risk assessment of foreign schools' participation in FFELP that is part of our corrective action plan in response to a GAO review in 2003. That assessment is in process and should be completed by the 9/30/04 CAP due date.</p> <p>PBO Management GAO discussed at length what they see as a lack of linkage between FSA's annual performance plan and the 2004-2008 Five-Year Strategic Plan and a lack of success measures and targets in the Five-Year Plan by which to gauge annual performance. They noted that the 2004 Annual Plan does not describe how achieving the annual goals will result in progress toward the five-year plan strategic goals. They suggested FSA look at annual and five-year plans considered the best among federal agencies, such as those of the Social Security Administration. GAO also noted that the 2003 report to Congress did not conform to the PBO legislation requirements in the area of senior management performance evaluations and awards and lacked an evaluation of the extent to which FSA met its goals and objectives. In the human capital area, GAO noted the need to complete and fully develop succession planning, to finalize the skills catalog (a more recent draft has been sent to GAO since the meeting), to more fully evaluate the usefulness of learning coupons (the most recent survey has been sent to GAO since the meeting), and the lack of a</p>	73%	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>		
		<p>system to track staff development. The last issue, as well as the ASEDS reorganization status, was discussed at the exit meeting. GAO also noted the need to link senior officials' performance agreements to organizational goals and suggested the basis for awarding bonuses to such officials be included in their performance agreements. The statement in GAO's point sheet about 6 of 11 senior officials' 2003 performance agreements not being linked to FSA's goals was resolved just prior to the meeting by redefining which senior officials were on the Management Council during what part of 2003.</p>		

<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>		
	6/10/2004	<p>General</p> <p>FSA management and staff continue to talk with GAO and provide information as requested. GAO is drafting their report and part of it related to integration has been shared with FSA. The exit conference is scheduled for 6/22.</p> <p>Financial Management</p> <p>E&Y has completed 4 of the 5 GA site visits for the 2004 financial statement audit. OIG's FISMA work has resulted in an interim alert memorandum related to perceived preventative control weaknesses in COD that bring into question the security Certification & Accreditations done to date on the Department's systems. FSA met with OMB to discuss our progress on costing and subsequently provided OMB with additional information on what costs we will be able to measure by the end of the year. DL consolidation reduced overpayments by 20% in April and underpayments by 10%. CFO released an Internal Control Review RFP to potential bidders. CFO has requested that the competition for support for its reconciliation reengineering project be opened to all firms after the response from small vendors was unsatisfactory.</p> <p>Systems Integration</p> <p>The final FEBI Phase 2 RFP was to be issued on 6/1/04, with proposals due back 7/6/04. OMB is still very interested in a feasibility study and analysis of how FSA might use loan-level detail from lenders to calculate more accurate payments to lenders. Data Strategy 2.0 and an NSLDS task together will provide that analysis by 9/30/04. Data Strategy 2.0 deliverables on FFEL data flows and student enrollment reporting have been finalized. CSB project phases 1 & 2 have been rebaselined and are moving forward, while phase 3 is on track for the original implementation date.</p> <p>Program Integrity</p> <p>OIG has initiated an audit of the process for discharging Direct and FFELP loans due to death and disability. FSA needs to watch this audit closely as GAO will no doubt refer to OIG's work as they move toward a high-risk list decision later this year. ASEDS has to complete a risk assessment of foreign schools' participation in FFELP by 9/30/04. That assessment has to clearly make the case that the new process for approving eligibility of foreign schools is more than adequate and that the actual level of risk, based on history, is low. The planned 5/23 enhancement of eZAudit was implemented. School audits continue to be resolved at goal level. ASEDS QA staff have tested the new Web-based ISIR analysis tool and are on track to deliver to schools by 9/30. Total non-consolidation recoveries are running 25% ahead of the same period last FY. The cure rate on 181-360 day delinquent non-consolidation Direct Loans continues to exceed the FY 2004 goal.</p> <p>PBO Management</p> <p>FSA provided GAO with additional information on management performance plans and awards, the ASEDS reorganization, use of staffing flexibilities provided for in the PBO legislation, and training opportunities and learning tracks. In a meeting with OMB, FSA management provided strong evidence of commitment to addressing OMB's comments related to performance and budget integration and financial management on the 3/31/04 PMA scorecard.</p>	69%	Green

54 **AWSS** *Deliver workforce development and support programs.*

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		6/25/2004	We are changing to yellow based on conditions beyond our control related to Milestones 4. Skills Catalog and Learning Tracks, 5. Implementation of One ED, and 6. Workforce Alignment, as outlined below. Otherwise, progress is being made in the remainder of the milestones related to this objective.	90%	Yellow
		6/10/2004	We are making substantial progress on all Milestones and the overall goals of Project 54 concerning workforce development and support programs.	90%	Green
55	AWSS	<i>Perform facilities management activities.</i>			
		6/21/2004	Completed after bi-weekly report submitted on 06/10/04.	100	Completed
		6/10/2004	Records management is 99% completed and is the last open item.	99%	Green
56	CFO	<i>Review Credit Reform estimates.</i>			
		6/24/2004	The Credit Reform Work Group (CRWG) subgroups have continued to make progress. On June 21 and 23 Budget Service presented to business owners an overview of the change in subsidy expense in FY04 vs FY03 due to changed assumptions. The outside agencies subgroup completed a discussion draft of observations and recommendations for improvement. The CRWG principals meet on June 24 to review progress and status, and discuss next steps.	33%	Green
		6/10/2004	The subgroups of the Credit Reform Work Group (CRWG) have continued to make progress. Credit reform technical support contractors have started to work with the CRWG subteams. On June 9, Budget Service presented to FSA business owners the analytical justification for \$2.3B of downward adjustments (reductions in estimated cost) to the FY03 estimates. The subteams also reported their progress in meeting the May 31 milestones identified in the credit reform CAP. They recommended closing several CAP action items; however, they agreed that much more work needs to be done, and will be done, in addition to the requirements of the CAP.	26%	Green
58	CFO	<i>Support the implementation of Oracle Federal Financials Release 11i.</i>			
		6/24/2004	The FSA Oracle 11i support contractor delivered draft white papers to FSA 11i team members for the following topics: FSA payment processing, FSA-related regulations impacting Oracle 11i upgrade, FFEL-GA and LaRS extensions, audit trail and reconciliations, and technical architecture.	64%	Green
			The FSA team has provided feedback on the project management office contractor's performance measurement plan deliverable.		
		6/10/2004	The FSA Oracle 11i support contractor continues to work according to their project plan. They are actively participating in the functional sub-teams and preparing white papers to further detail functional requirements and consider implementation options. Current white papers being drafted include FSA payment processing, FSA related regulations impacting Oracle 11i upgrade, FFEL-GA and LaRS extensions, audit trail and reconciliations, and technical architecture. The first draft of these white papers are due by the end of June.	59%	Green
			The FSA team has provided feedback on the implementation contractor's work breakdown structure deliverable. The comments were significant enough to warrant another draft version of the document.		

<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>		
59	CFO	<i>Implement automated budget funding entry solution.</i>				
			6/24/2004	The FMS contractor delivered the final Technical Design document and functional test scripts. The EDCAPS contractor is complete with the draft technical design document. Regular meetings have been occurring, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all agree to the requirements and initial design specifications.	50%	Green
			6/10/2004	The FMS contractor delivered the final functional requirements document on 6/11. The FMS functional test scripts and technical design document are well underway, planned for delivery by the end of June. The EDCAPS contractor is close to completion on the draft technical design document. Regular meetings have been occurring, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all agree to the requirements and initial design specifications.	45%	Green
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>				
			6/25/2004	This item is reported under the Milestones, Item # 62.2.	60%	Green
			6/8/2004	The report for this item is included under the Milestones, Action Item Number 62.2.	50%	Green
63	ADS	<i>Improve school partner oversight.</i>				
			6/25/2004	See milestones 63.1, 63.6, and 63.8 for progress updates.	73%	Green
			6/11/2004	See milestones 63.1, 63.6, and 63.8 for progress updates.	70%	Green
65	ADS	<i>Create a target state vision of a Front End Business Integration (FEBI).</i>				
			6/16/2004	During the past several months, progress updates have been provided on the solicitation and negotiation phases of the FEBI project and the percentage complete was tracking those activities. Because the success measure for this Action Item is "Create a target state vision for an enterprise, integrated front-end service delivery system" we are updating the percent complete field to 100%. The target vision, which informed the SOO development, was completed in February 2004. Progress is being made and the project is on schedule to make an award by the end of the FY04 fiscal year, as anticipated.	100	Completed
			6/10/2004	Progress being made and on schedule per project plan. Currently in Phase 2 of the solicitation and will begin negotiations with potential vendors. Due to federal contracts policy, updates on negotiations and progress cannot be provided.	65%	Green
67	ADS	<i>Prepare to implement IRS data match.</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>
			6/25/2004	<p>The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. They had planned to give the presentation to the Management Council on Thursday, 6/10/04, but the meeting was rescheduled for 6/22/04. The 6/22/04 meeting also needed to be rescheduled. The Workgroup is now scheduled for 8/3/04 to make the presentation.</p> <p>The Workgroup continues to meet to develop a high level plan for conducting an IRS demonstration pilot in the first year(s) of implementation.</p> <p>In addition, the Workgroup is developing an IRS Match presentation for the NASFAA Conference in Minneapolis in July 2004.</p>	78%	Green
			6/10/2004	<p>The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup gave the presentation to the Management Council on Thursday, 6/10/04, and made recommendations to the Council about future work it believes should be done on the IRS Match project.</p> <p>The Workgroup continues to meet to develop a high level plan for conducting an IRS demonstration pilot in the first year(s) of implementation.</p> <p>In addition, the Workgroup is meeting on Monday, 6/14/04, to develop an IRS Match presentation for the NASFAA Conference in Minneapolis in July 2004.</p>	78%	Green
68	AWSS	<i>Continue Learning Coupon program.</i>				
			6/25/2004	We are at 43% of our goal. This is in line with historical usage patterns. The majority of coupons are submitted in July and August. Online database is ready to launch.	30%	Yellow
			6/10/2004	205 employees have submitted coupons: 41.4% of our goal. \$77,605 has been obligated: 38.3% of our goal. Online database is still with the contractor, who is working on other FSA priorities.	30%	Yellow
69	AWSS	<i>Provide Career Zone services.</i>				
			6/25/2004	<p>The Career Zone is currently offering a 4 week Conversational Spanish class to help staff develop skills to communicate and understand Spanish as it relates to your professional work in FSA. Classes started June 14 and will run through August 6th.</p> <p>Career Zone evaluations remained consistent through the month of May with an overall score of 4.60 on a 5 point scale. Career Management Workshop (Resume/KSA, Interviewing) received the highest rating of 4.85. The Career Zone has provided learning and development services to over 500 FSA employees in FY04 (Oct 2003-May 2004). This surpasses the prior fiscal year (FY03) by over 200 participants. The Career Counselors have engaged 45 new career counseling clients since their arrival in January 2004. Staff evaluations for Career Counseling services received an overall score of 4.75.</p>	75%	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>		
		6/10/2004	The Career Zone team met with staff and counselors from the Super Regions (Atlanta, Chicago, San Francisco) to discuss partnering to provide regional career management services to FSA staff. Regional career management services are scheduled to begin the week of July 20-23 with two planned visits to Kansas City and Dallas. The services that will be provided include career counseling, assessments and career management workshops. Two NSLDS workshops, beginners and advanced, will be conducted for staff to obtain skills in extracting and analyzing data from NSLDS database through the available software tools. Topics will include: TSO, QMF, SQL and overview and updates to NSLDS. The 3rd course in the Career Zone Title IV series, Direct Loans was presented in June. The 2-hour session provided staff with the fundamentals of the Direct Loan Program and included information on Stafford Loans, PLUS Loans, and Consolidation Loans. The Career Zone will introduce a Guest Speakers Series beginning in June. The speaker this month will be Dr. Max Larsen from Gallup who will be discussing StrengthsFinder from the book, Now Discover your Strengths. The feature book and movie from the Lunch-N-Learn series for the month of June is, Fish by Stephen Lundin and Whale Done by Ken Blanchard, respectively.	75%	Green
70	ADS		<i>Increase Student Financial Aid program awareness.</i>		
		6/25/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. The Contracts Review Board has approved draft SOO and invitation to offerers. Request for capability statement posted on GSA Advantage June 17th. Capability statements due June 30th. On track with project calendar.	55%	Green
		6/10/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. Draft SOO and invitation to offerers is before Contracts Review Board for approval. Anticipate posting the request for capability statement the week of June 14th.	50%	Green
71	ADS		<i>Reengineer EDEExpress.</i>		
		6/25/2004	The contractor has delivered a schedule for the new release of Return to Title IV Funds on the web software. The new anticipated release date is September 12, 2004. Therefore, we requested a revision to the schedule for completion by September 30, 2004. Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. 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 the fall of 2004.	95%	Green
		6/10/2004	The list of issues has been agreed upon with the contractor, who will provide revised documents and a schedule. An adjusted date for project completion has been requested, based on the revised schedule. Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. 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 the fall of 2004.	95%	Yellow
72	PL		<i>Develop a Late Disbursement Approval and Tracking system.</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>			
		6/18/2004	With the approval of the IPC on Wednesday, June 16, 2004, this project is cancelled for FY 2004. It has been determined that automating this process is not cost effective. In addition, this process is being successfully being performed manually.	00%	Cancelled	
		6/11/2004	This Project should be cancelled because it has been determined that automating this process is not cost effective. In addition, this process is being successfully performed manually.	50%	Green	
73	CIO	<i>Develop FSA Security and Privacy Architecture Pilot.</i>				
		6/25/2004	A draft SOO for the conceptual design of the security architecture has been presented to the ILSC partner. Currently we are working on restricting the scope of work so that the conceptual architecture can be completed with in the allocated budget and the timeframe.	48%	Green	
		6/18/2004	The security architecture business case was presented and approved by IPC for FY05 funding. The conceptual design SOO is under progress. We are also under discussion with the ILSC partner for potentially performing the conceptual design.	48%	Green	
		6/14/2004	The SOO for the conceptual design is currently being drafted. FY05 funding for Phase 2 of the security architecture has been approved by IPC. The final deliverable from prototype design has been accepted.	48%	Green	
74	AWSS	<i>Implement Leadership Excellence development training.</i>				
		6/25/2004	Of 3 items to be accomplished, 2 have been completed but since the Management Council has not determined what approach they want to take on a 360 assessment, we have not met that target (as of this date.) No new activity to report.	66%	Yellow	
		6/10/2004	No new activity to report.	60%	Green	

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.					
				6/25/2004	SAA participated in 2 continuing partnership activities - June 15 – Demonstrated Student Aid on the Web for staff of the National College Access Network. June 21 SAA participated in the HUD Neighborhood Network Week kickoff celebration at Paradise at Parkside multi-family housing complex in northeast Washington, DC. Question about federal student aid were answered and information was distributed to housing residents. This was one of 150 celebration events being held nationwide June 21 – 25.		100%	Complete
					New activity – SAA partnered with the Secretary’s office to distribute financial aid and No Child Left Behind materials at the African-American Heritage Festival in Baltimore, MD on June 18 – 20.			
				6/10/2004	SAA participated in 1 continuing partnership activities - May 12-16, conducted training on federal student aid and default prevention and distributed financial aid information to TRIO coordinators during the Legislative and Regulatory Requirements Workshop sponsored by Western Kentucky University. In addition, dialog was initiated with the Pathways to College Network to explore establishing a partnership to enhance dissemination of federal student aid information. The Pathways to College Network is a broadCoalition of national organizations committed to improving college access and success for underserved populations.		100%	Complete
		1.2	Publish accurate and timely information that meets the needs of our audience.					
				6/25/2004	Completed paperwork to open the GPO jacket for design purposes. Meeting with GPO the week of June 28th to discuss The Student Guide. Received feedback from summer interns on the Guide and will incorporate their suggestions. Review of draft HEA reauthorization has begun.		16 %	Green
				6/10/2004	GPO jacket for design purposes will be established the week of June 14th so that a meeting can be set up with GPO to discuss The Student Guide. We received feedback from summer interns on the Guide as part of the effort to enhance Guide visually/graphically. The fact-checking process has begun for the High School Counselors Handbook.		15 %	Green
		1.3	Disseminate information directly to target audience.					

6/25/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 6/23/04, SAA has provided federal student aid information and distributed materials to approximately 76,119 persons. The following number of persons received information during this reporting period: June 15, 2004 NCAN Webnair 10Jun3 18-20, 2004 African American Heritage Festival 1500 June 21, 2004 US HUD Neighborhood Networks 400 During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.

73 % Green

6/10/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. SAA did not provide or distribute federal student aid information and/or materials between May 29, 2004 and June 11, 2004. SAA has reached to date 74,199 persons. During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should situate SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.

70 % Green

1.4 Respond accurately and timely to requests.

6/25/2004 For the period 6/4/04 –6/18/04, the Editorial Services Contract responded to the following correspondence: 67 controls--- (78 prior period)-----turnaround (3 days)=100% 1155 non-controls--- (1301 prior period) —turnaround (2 days)=100% 1866 e-mails--- (1982 prior period)-----turnaround (2 days)=100%

99 % Green

6/10/2004 For the period 5/24/04 –6/4/04, the Editorial Services Contract responded to the following correspondence: 78 controls--- (74 prior period)-----turnaround (3 days)=100% 1301 non-controls--- (1723 prior period) —turnaround (2 days)=99% 1982 e-mails--- (1968 prior period)-----turnaround (2 days)=100%

99 % Green

1.5 Reach customers through Student Aid on the Web.

6/25/2004 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 (06-06- to 06-19-04) are 720,902 and 12,582,315 respectively. During the same period last fiscal year we had 532,443 visits and 8,182,753 hits. This represents FY04 increases of 35.4% for visits and 53.8% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 36,388 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.

100% Complete

6/10/2004 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 (05-23- to 06-05-04) are 729,966 and 12,146,903 respectively. During the same period last fiscal year we had 523,281 visits and 7,847,615 hits. This represents FY04 increases of 39.5% for visits and 54.8% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 35,484 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.

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.

6/25/2004 Progress continues as follows:

73 % Green

Replacement of Autonomy Search Engine -- OCIO is currently in the middle of building a Google production infrastructure at this time. They are waiting for the delivery of a Google appliance and firewall equipment that will take about 3-4 weeks. Indus (the Schools Portal and IFAP maintenance contractor) may be able to work on Google conversion project in August 2004.

EZ Audit -- CSCC staff continue to handle EZ Audit password resets. Status meetings are scheduled every other week. We have noticed an increase in our call volume, especially as we approach a June 30, 2004 EZ Audit deadline.

Spanish Greetings -- In order to improve our service to our Spanish speaking customers, we have added a script in Spanish so that when callers contact our center, they now have the choice of hearing our greetings and options in Spanish.

Customer Feedback -- Richard Brand of Maryville College submitted an inquiry to CSCC which questioned how the CPS handles transactions when a student changes his/her marital status after the student has initially applied. He suggested that we should reject the transaction. That suggestion was forwarded to the Application Development Team. The team indicated that they would consider the change in the 2006-07 processing cycle (since the 2005-06 requirements phase has already closed).

Mr. Phil Gordan, Financial Aid Professional at Highland Community College, called us with a concern regarding the final paragraph on page AVG-103 of the Application & Verification Guide [2004-2005]. It seems to suggest that one can adjust an applicant's EFC. He provided a suggested change. The change was submitted to the Research & Publications staff who will hold the suggestion for inclusion in next year's FSA Handbook. R&P staff agreed with the change.

6/11/2004 Progress continues as follows:

70 % Green

EZ Audit -- Transition has been completed. The CSCC phone scripts were updated so that EZ Audit password resets and status checks are now being routed to CSCC staff.

Customer Service -- We are in the process of updating our CSCC phone scripts to allow for a Spanish version for our greeting and phone options.

IFAP Subscription Service -- As of the end of May 2004, we have reached an all time high of 5,119 subscribers to our IFAP subscription service. This is an increase of 201 users since the previous month.

<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>
5	ADS	Process Pell and Direct Loan transactions through the Common Origination & Disbursement (COD) system.						
			5.2	Issue COD SOO.				
					6/11/2004	The final FEBI Phase 2 RFP was issued on 6/1/2004. Proposals are due by 7/6/2004. Task completed.	100%	Complete
6	ADS	Administer Campus-Based (eCB) activities.						
			6.5	Issue FISAP software release.				
					6/25/2004	FISAP testing continues and will be completed by 6/24/2004. We are on track to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.	88 %	Green
					6/11/2004	On 6/2/2004, the IPC approved the requested extension in the target completion date for Project 6 and Milestone 6.5 from 6/30/2004 to 7/30/2004. (Earlier this year when we revamped the milestones under Project 6, we neglected to extend the target end date for this milestone (and accordingly, for the project) from 6/30/2004 to 7/30/2004. The project plan for the FISAP software has always projected the release of the software on 7/12/2004; there has been no delay in completing the project or extension of an earlier release date for any reason. Additionally, the 7/12/2004 scheduled release date is well before the Master Calendar required release date of August 1st.) At this time, FISAP testing is progressing. We expect to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.	84 %	Green
8	ADS	Expand eZAudit initiative.						
			8.1	Be Prepared for Contract Award.				
					6/25/2004	The statement of objectives is in its final review. Target completion is end of June. Market research will be kicked off first week in July. Current contract has been extended 2 months through Nov. The target for award of the new contract is on track for Oct 1.	70 %	Green
					6/11/2004	No change.	65 %	Green
			8.2	Complete first full cycle of processing (all school types).				

	6/25/2004	Change completion date to 9-30-04. Since this is a processing system, we will continue to process throughout the year. We are continuing to process school submissions on a daily basis. We streamlined the QC process on 6-21 by having the Case Teams review the QC completed by the DRCC. Case Teams will note any discrepancies and report those to the Ezaudit Team. As of 6-21-04, 1,933 annual audit submissions have been rec'd, of which 1,240 have passed the QC screening. Metrics gathering is in process to evaluate the quality of the school input and the DRCC review of the school data.	55 %	Yellow
	6/11/2004	As of 6-06-04, 1,771 annual audit submissions have been rec'd, of which 1,094 have passed the QC screening. We have developed procedures for reducing the redundancy in the QC process.	50 %	Yellow
8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.			
	6/25/2004	As of 6-21-04, 3,035 schools have registered, about 70% of all schools.	70 %	Green
	6/11/2004	As of 6-06-04, 2,985 schools have registered, about 63% of all schools.	63 %	Green

9 ADS Enhance program monitoring and oversight.

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

	6/25/2004	For the biweekly period 6-07-04 to 6-21-04, 88% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay.	68 %	Green
	6/11/2004	For the biweekly period 5-24-04 to 6-06-04, 80% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay.	65 %	Green

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

	6/25/2004	Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 25%. 603 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,753 on 6/13/2004. Training materials for the other compliance initiatives will be ready July 9, with training of trainers scheduled for July 27 -29.	68 %	Green
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6/11/2004 The Administrative Actions & Appeals Division has received 49 referrals for administrative action and initiated 13 debarments from 10-01-03 through 6-07-04. For the FY 2004 Compliance Initiative, preparation of training materials is on schedule. Training is scheduled for July 27 - 29. This was the earliest available time to get conf rms.

9.3 Conduct School Relations initiatives.

6/24/2004 HBCU defaulted Perkins project began. The project is tiered over 5 years of historical HBCU Perkins default data off of a handful of schools. 82 % Green

6/9/2004 The HBCU, H SI, and Tribally Controlled mailing list has been completed and is available to the internal staff. 80 % Green
Perkins: eCB has moved on to the new tracking of the current Perkins ELC letters. There is no significant movement in this project.

9.4 Conduct the Experimental Sites initiative.

6/24/2004 No major developments since the last update. Staff in FSA's Operational Performance Analysis/Reporting & Internal Review Group continues to analyze the data submitted by Experimental Sites Schools. The draft report on the results from the experiments during academic year 2002-03 is due to ASEDS by July 2004. 75 % Green

6/9/2004 No major developments since the last update. Staff in FSA's Operational Performance Analysis/Reporting & Internal Review Group continues to analyze the data submitted by Experimental Sites Schools. The draft report on the results from the experiments during academic year 2002-03 is due to ASEDS by July. 72 % Green

9.5 Administer the Quality Assurance program.

6/24/2004 On June 24, 2004, the QA Program Staff in ASEDS participated with the Students Channel and Pearson Government Solutions in the Product Readiness Review (PRR) for Phase I of the 2004-05 ISIR Analysis Tool. William Leith, Deputy Director of Application Processing, signed off on Phase I of the product, which will be available to schools by June 30 through FAA Access to CPS on-line. The QA Program Staff have begun developing guidelines, and scheduling training – via Webex in July and August -- for QA schools. 85 % Green

6/9/2004 The QA Program Staff in ASEDS conducted acceptance testing at the Pearson facility for Phase I of the new web-based version of the 2004-05 ISIR Analysis Tool software. The Product Readiness Review is scheduled for June 24, and we expect to sign-off on (accept) the Phase I final ISIR Analysis Tool at that time. Work on developing guidelines for schools has begun and the final guidelines for schools are on target to be delivered by September 30. 80 % Green

9.6 Conduct vulnerability assessment.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					6/25/2004	The team leader continues to meet with subject matter experts in the area of school eligibility, oversight, and systems processing. The team leader has also researched the common data architecture deliverables on data quality, security, and privacy and is meeting with subject matter experts about identified vulnerabilities and mitigation strategies. Additional research, and interviews with subject matter experts are planned for the next reporting period.	30 %	Green
					6/11/2004	The team leader has gathered and reviewed OIG and GAO reports about ASEDS internal controls and business process vulnerabilities. The team leader is gathering business process and system documentation and is meeting this week with school identifier Subject Matter Experts (SMEs) about school application process risks and vulnerabilities.	25 %	Green
10	ADS	<i>Produce school publications and materials.</i>						
		10.1	Annually update and disseminate the Federal Student Aid Handbook.					
					6/24/2004	Volume 6 of the Student Aid Handbook has been posted on IFAP. The project is now caught up to where it is supposed to be and is back in the green.	70 %	Green
					6/9/2004	The expected comments for the second portion of the handbook had an unusually long delay. There is an expected jump in percentage completeness this coming week when the handbook goes live.	60 %	Yellow
		10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.					
					6/25/2004	The Basics brochures are with the Publications group. The PLUS brochure is awaiting the completion of final revisions before OPA review. The students brochure is being designed. We are hopeful that printing will occur in July 2004. Currently, there are 42 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure.	73 %	Green
					6/11/2004	The Basics brochures are progressing through the development phase. The Direct Loan PLUS Basics brochure is completing final FSA review. It will go to OPA for review shortly. The brochure for students is being designed. Currently, there are 35 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure and will be filled when the new brochure is finished. Schools have been informed about the out of stock item in the COD Processing Updates and other communications.	70 %	Green
13	BS	<i>Enhance program monitoring and oversight.</i>						
		13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.					

Milestone# Action Item

Status Date Comments %Complete Status

6/25/2004 Total non-consolidation recoveries have now reached \$1.216 Billion, an increase of 25 percent over the same period, thru June 18th, in FY03. 80 % Green

6/8/2004 Total non-consolidation recoveries reached \$1.109 billion, an increase of 25 percent from the same period, end of May, in FY03. This represents 6.97 percent of the FY04 portfolio balance. 70 % Green

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

6/29/2004 The June 2004 target completion date that is currently on the FY 2004 Performance plan is incorrect. The target completion date for this item should be September 2004. 65 % Green

6/25/2004 The Default Management Workgroup met on June 22. The group finalized definitions and inventory groupings for the overarching strategies. 65 % Green

6/8/2004 The Default Management Workgroup meeting has been rescheduled for June 22. The Group has updated the inventory and modified definitions of the overarching strategies as needed. The goal for the meeting on the 22nd will be to reach consensus and finalize the changes. 65 % Green

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

6/25/2004 The Lifetime Default Rate analysis has on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio has been completed. The analysis on the FFELP portfolio for the same cohorts has begun. The Risk Management Team will be working with NSLDS staff to develop the SQL for extracting NSLDS data for this analysis. 75 % Green

6/8/2004 The Lifetime Default Rate analysis has begun on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio. The next step will be to apply the analysis to the FFELP portfolio. That analysis will begin after the training is completed for the staff on NSLDS. 75 % Green

13.4 Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.

6/25/2004 The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-July. 60 % Green

6/8/2004 The success measure for this item is to increase the cure rate on 181-360 day delinquent loans in the non-consolidation Direct Loan portfolio by 1 percent over the FY2003 baseline by September 2004. The goal was achieved in January 2004 and has continued thru the month of May. The goal for FY2004 is 55.1 percent. The actual rate for May 2004 was 59.3 percent. Direct Loan Servicing staff will continue to work with schools to main the goal each month thru September 30, 2004. 60 % Green

13.5 Conduct vulnerability assessment.

6/25/2004	The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new CSB implementation schedule. Once the plan is complete, Borrower Services staff will review it for final approval. The plan will be used for the assessment for the rest of 2004.	80 %	Green
6/8/2004	The independent Verification and Validation (IV&V) team is working on the project plan to align it with the new schedule. Once the plan is complete, Borrower Services staff will review it for final approval.	75 %	Green

16 FPS Perform National Student Loan Data System (NSLDS) maintenance and operations activities.

16.1 Perform cohort default rate calculations, send, and post.

6/25/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green
6/11/2004	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.

6/25/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green
6/11/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green

16.3 Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.

6/25/2004	The June benchmark reports will be available during the second week in July.	72 %	Green
6/11/2004	The May benchmark reports were reviewed and distributed. The edit passage rates for the guaranty agencies rose to a 99.03% passage rate.	72 %	Green

16.6 Provide monitoring functionality of GA and lender reasonability on a monthly basis.

6/25/2004	The proposal for the task order was accepted by FSA and is awaiting approval from the contract review board.	56 %	Green
6/11/2004	The proposal was received from the contractor and reviewed. FSA staff asked for clarification on a few minor points. Contracts is awaiting response.	55 %	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>
19	FPS	Perform maintenance and operations activities for the Financial Partners Data Mart.						
		19.1	Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.					
			6/25/2004	The Region Directors will be re-evaluating the lender and GA scorecard.			85 %	Green
			6/11/2004	The team submitted several changes to the contractor for resolution. Several issues were closed and move to production. May report submitted with this update.			80 %	Green
		19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes.					
			6/25/2004	FP Operations team has received FY01 and FY02 data. The data was loaded with no discrepancies.			80 %	Green
			6/11/2004	Trigger Rate Data for FY01 and FY02 is missing. FP Data Mart Operations has requested FMS Operations to submit this data.			75 %	Green
		19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.					
			6/25/2004	A meeting was held with FMS Operations to discuss: loan repayment value, current reimbursement rates and lender fee data. This data will be sent to the data mart within the next 4 weeks.			85 %	Green
			6/11/2004	No discrepancies were found during this QC period. QC report submitted			80 %	Green
20	FPS	Perform Financial Partners Portal operations activities.						
		20.1	Monitor and evaluate web page hits to drive future postings to portal.					
			6/25/2004	A meeting was held to verify and validate the requirements for a new LEAP/SLEAP page on the portal.			93 %	Green
			6/11/2004	Analysis completed, results submitted with this update.			90 %	Green
		20.2	Maintain current and relevant information to financial partners' user community.					
			6/25/2004	A meeting was held with the contractor to discuss ways to avoid having the "Whats New" page limitation removed, if possible.			88 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					6/11/2004	Continue to make content changes. May report submitted with this update.	85 %	Green
			20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.				
					6/25/2004	The team is working with FMS on posting several new items (survey announcement, instruction on creating a lender/servicer report).	95 %	Green
					6/11/2004	No internal/external feedback received during this reporting period.	90 %	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>						
			21.3	Review and approve applications from states. Obligate, generate, and mail grant award notifications to states.				
					6/25/2004	89% of all potential entities have submitted applications. After following up with states to ensure that all potential entities have had the opportunity to apply, two additional states may submit applications. Turnover at the state was the reason for non-response. FP staff is working with these states to ensure opportunity for funding. Currently, 36 of those states that have submitted applications have been processed and approved. FP staff is processing the remainder of the received applications.	70 %	Green
					6/11/2004	96% of the states have submitted applications for the next award year. Financial Partners Services (FPS) is following up with those states that have not yet submitted applications to verify whether or not they still intend to apply. FPS is currently reviewing the submitted applications for eligibility before granting awards.	50 %	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>						
			22.2	Prepare performance measure assessment and benchmarking reports.				
					6/25/2004	Evaluation of the best sources for the data to feed the performance measures in anticipated to be completed the week of June 28th and a draft reporting will be forwarded for comments the week of July 5th.	92 %	Green
					6/11/2004	Cost Neutrality and Benchmark recommendations were discussed with Sally Stroup and Terri Shaw. Moving forward with collecting internal information on those performance criteria that can be evaluated internally. This information will be incorporated into a draft report format and circulated for review. Reporting of Default Aversion Assistance information will not be feasible until July.	91 %	Green
			22.3	Evaluate new applications for VFA.				

6/25/2004 Due to a transition of staff assigned to the VFA team, the draft process document was not forwarded for comment the week of June 14th as anticipated. It will be forwarded for comments on Friday, 6.25.2004. In the meantime, Financial Partner Services has received formal notification of a VFA proposal from the National Student Loan Program (NSLP) and the Education Assistance Corporation (EAC). The draft process document has been used to initiate the first steps of the evaluation process and timeframes for the associated steps is being evaluated/tested. 98 % Green

6/11/2004 The "transmittal to Congress" phase of the process has been incorporated into the process document. The draft document will be forwarded for comments the week of June 14th. The last remaining process steps to be documented include the formal signature process that will be used to execute the agreement. A separate document that covers the implementation phase will be developed. In addition, Financial Partners has just received informal notification that another guaranty agency is preparing to submit a VFA proposal. The draft process flow document will be used as a base for processing this request and the timeframes associated with each process step will be tested. 97 % Green

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

6/25/2004 The meeting with OMB on Monday, 6.14.2004 resulted in concurrence with the costing approach that was taken by FSA. Financial Partner Services is preparing to provide the results of the VFA participants. Planning for participation in next quarterly VFA Information session in Boston is underway which includes an invite to V. Bateman to meet with the VFA CEO's. 78 % Green

6/11/2004 Due to time constraints, it was not feasible to schedule a conference call with the participants of the VFA Information Sharing session being held in Sacramento CA, June 7-9. A follow-up communication with the VFA guarantors will be scheduled to discuss the results of the Cost Neutrality Analysis after the Monday, 6.14.2004 OMB meeting to discuss the costing model. 75 % Green

23 FPS Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.

23.1 As appropriate integrate ERM work with other FSA business units. Identify opportunities to integrate at the enterprise level.

6/25/2004 FP completed Project Plan/Charter - Imaging System Modifications that identifies findings from the ERM Workgroup in April 2004. Documentation was submitted to support closure of this action item. 100% Complete

6/11/2004 FP reviewing revised Project Charters. The new charter identifies how the new subcategories and document types will be added to the current FP File index. 85 % 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.

6/25/2004 FP completed a work plan that identifies how and when improvements were implemented in April 2004. For those improvements needing funding approval, they were included in the most recent business case (which was approved June 2004). Documentation was submitted to support closure of this action item. 100% Complete

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					6/11/2004	Staff continuing to work on preparing revised plan.	78 %	Green
25	FPS	<i>Enhance program monitoring and oversight.</i>						
		25.1	Participate and provide Financial Partners Channel support for ED audit.					
			6/25/2004	Ernst & Young (E&Y) has completed all five scheduled GA site visits. The New Mexico site visit concluded on Thursday, 6.10.2004 with no findings mentioned during the closing conference. During the post GA site visit phase, E&Y will review all work papers to determine if there will be any official findings to report. FP continues to assist E&Y on collecting residual outstanding requests from the five GAs.			85 %	Green
			6/11/2004	Ernst & Young (E&Y) has completed three of the five GA site visits. The Boston (ASA) GA E&Y site visit was completed on Friday, 5.21.2004 and no findings have been reported to date except for two outstanding narrative responses provided by ASA still needs to be reviewed by E&Y on differences with Subrogations and Federal Receivables. ASA provided narratives (explanations) to E&Y for those differences and FP is awaiting E&Y's review of those documents. FP will follow-up with any remaining ASA outstanding audit issues. The Great Lakes GA E&Y site visit was completed on Friday, 5.28.2004 and no findings have been reported. The Vermont GA site visit began Tuesday, 6.1.2003. The New Mexico E&Y site visit is set for Monday, 6.7.2003.			65 %	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.					
			6/25/2004	During this reporting period a two-week program review of the South Carolina guaranty agency was concluded and the first week of a two-week review at the Rhode Island guaranty agency was completed. An updated Compilation of Lender and Servicer Review Findings and Observations Report was issued.			55 %	Green
			6/11/2004	During this reporting period conducted a program review site visit to Nelnet's Indiana Service Center. Also completed the first week of a two-week review at the South Carolina guaranty agency.			53 %	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.					
			6/25/2004	Continued Work in progress - Staff continuing to respond to lenders' questions and request for guidance concerning lender audit guidelines and procedures. Staff is also continuing to review A-133 GA compliance audits and resolve accordingly. In addition, FY03 lender audits are being received by FP for review and resolution (if applicable).			94 %	Green
			6/11/2004	Continued Work in progress - Staff continuing to follow-up with lenders who have not submitted FY02 lender audit reports. Staff is also continuing to review A-133 GA compliance audits. In addition, FY03 lender audits are being received by FP for review.			90 %	Green
		25.4	Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.					

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					6/25/2004	The proposed meeting for Washington, DC has been cancelled. Efforts to update scorecards will be done via conference calls as in the past. Regional Directors will have team leads write up a supplemental section that analyses the GA scorecard with review findings to help validate performance metrics. This will be used as internal information within Financial Partners.	72 %	Green
					6/11/2004	The power user group and DMIT participants would like to have another meeting but this one will be in person. D.C. has been talked about as the location due to contractor support, etc. The workgroup would go over the lender and GA scorecard to determine what is left to fix and determine if we have a good product. A decision should be made soon to determine the date of the meeting.	69 %	Green
			25.6	Conduct vulnerability assessment.				
					6/25/2004	The proposal on the task order was accepted by FSA and is awaiting contract office written approval.	15 %	Green
					6/11/2004	The proposal was received from the contractor, reviewed and accepted. Awaiting award from contracts office.	13 %	Green
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>						
			45.1	Complete market research to resolve plan issues.				
					6/30/2004	Appropriate market research was completed in order to update the Enterprise Procurement Plan.	100%	Complete
					6/25/2004	Met with CIO staff and have agreed to use Gartner to perform a 6-week strategic market research effort. The effort will not begin until at least the week of 19 July.	70 %	Yellow
					6/11/2004	We are investigating and analyzing approaches to accomplishing the VDC Market Research.	70 %	Green
			45.2	Synch Plan w/BIG End State Vision.				
					6/25/2004	Plan is complete.	100%	Complete
					6/11/2004	Vendor delivered the plan. Need to review one final time and we can then call this complete. Completion will occur before the 9/30/04 deadline. C	95 %	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>						

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			47.1	Incorporate CSB into enterprise process.				
					6/25/2004	Completed	100%	Complete
					6/11/2004	Complete. A training session with CSB personnel was conducted on 05/27/04.	100%	Green
			47.2	Incorporation of FEBI into process by September 30, 2004.				
					6/25/2004	Monitoring FEBI status. The progress and status will remain at Yellow until FEBI has reached a point that permits incorporation into the process. No change from last reporting period.	45 %	Yellow
					6/11/2004	Monitoring FEBI status. The progress and status will remain at Yellow until FEBI has reached a point that permits incorporation into the process.	45 %	Yellow
48	EPMS	Continuously update and monitor procurement internal controls.						
			48.2	Establish reporting process to monitor vendor performance.				
					6/25/2004	Contractor support has reached the proposal stage. Full implementation of the process and reporting vendor performance will extend beyond September 2004, as new acquisition initiatives such as IPM take flight.	50 %	Yellow
					6/11/2004	Contractor support remains in the due diligence stage. Full implementation of the process and reporting vendor performance will extend beyond September 2004, as new acquisition initiatives such as IPM take flight.	45 %	Yellow
54	AWSS	Deliver workforce development and support programs.						
			54.1	Continue Intern Program.				
					6/25/2004	We're on track for completing our success measures. We had approximately 500 applicants apply for the 35 summer intern positions. We have renewed our contract with MonsterTrak based on the level of interest and superior candidates that were available this year. We are developing a survey and working with FSA University to conduct a special FSA Traditions training that will address our first success measure regarding the interns obtaining valuable insight into what we do at FSA. We have hired 16 interns that are working in the office of the CIO, thereby addressing our second success measurement of students providing technological support in the work place	75 %	Green

6/10/2004 The summer interns are in place through out FSA as planned. FSA has a total of 39 interns on board and 3 interns are participating in the SCEP program (Student Career Experience Program) . FSA plans to hire the 3 SCEP interns at the end of this summer upon graduation from their respective schools. All of the new interns attended a brief FSA orientation on 6/2/04. As of today , all the interns have been assigned computers and phones. Efforts are currently underway to get their voice mail, mailbox locations, fitness center membership, and security clearance info, properly processed. 75 % Green

54.2 Conduct FSA Orientation.

6/25/2004 Revisions will be made to selected materials of the FSA New Employee Orientation Program. The FSA NEOP Website Design Team met on June 23, 2004 to discuss the type of information to be placed on the site and agreed on a target date for completion of test site. Preview of the new FSA New Employee Orientation Program video was re-scheduled for June 28, 2004. 90 % Green

6/10/2004 The FSA New Employee Orientation Program session was held on June 2, 2004. A debrief of the lesson learned from the FSA NEOP June 2, 2004 session is scheduled for June 15, 2004. 90 % Green

54.3 Implement results of One-ED Competitions.

6/25/2004 On June 15, 2004, the Department officially announced it's decision to award the payment processing contract to the Department's MEO proposal. We anticipate that this decision will impact FSA employees and have made initial contact with the Department's Human Resource Advisor (HRA) to discuss the impact on FSA employees and facilitate the implementation of the award decision. The initial implementation date of June 2004 was premised upon the expectation that the Department would award the contracts for HR/Training and Payment Processing on the projected dates. The initial award decisions were expected in December of 2003, but were postponed until March, 2004. Since then, the March, 2004 deadline has been postponed until June 2004. Implementation of changes required by competitive sourcing decisions will likely require 90 days or more to develop, negotiate on, and implement. Based on this, we are adjusting the completion date on this to project an end of fiscal year (September 30, 2004) completion date. 25 % Yellow

6/10/2004 Recent communications within the Department of Education announced the decision to award the Payment Processing contract to the ED Most Efficient Organization (MEO) proposal. Once formal, FSA HR will work with appropriate ED offices to identify affected FSA employees and facilitate the implementation of the needed change. 25 % Green

54.4 Update Skills Catalog/Learning Tracks.

6/25/2004 Team presented a brief presentation to the Management Council on Friday, June 4. A draft copy of the Skills Catalog was sent to each area for a final review on June 4 with a deadline of June 11 for comments. We are still striving to receive back a complete set of comments as of June 24. A focus meeting was held on June 23 and another group is scheduled for June 25. The meetings focus on developing an online Skills Catalog tool and we are asking the group to suggest what the tool would need to do in order for it to be useful to all staff. 85 % Yellow

6/10/2004 Team presented the Skills Catalog to the Management Council on Friday, June 4 for final approval. Management Council will submit updates /changes by close of business Monday, June 14. After the final revisions are made to the document, the complete copy will be sent to the proofreader. During this time, the development team will continue to met before the tentative roll-out date of July 12. 85 % Green

54.5 Implement Workforce Alignment Strategy.

6/25/2004 The union has provided FSA with both a data request related to the ASEDS reorganization as well as their proposal for our negotiations, which are now scheduled to begin on June 30, 2004 in Washington, DC. On June 21, 2004, the Secretary signed our request for VERA/VSIP authority and transmitted it to OPM. The approval process took longer than anticipated and we have determined that implementation of this reorganization can occur no earlier than August 22, 2004. Based on this, we are adjusting the completion date on this to August 2004. 94 % Yellow

6/10/2004 On May 26, 2004, FSA's proposal to reorganize ASEDS was approved by the Office of Management. On May 27, 2004, both the union and all ASEDS managers/supervisors were notified of the approval and provided information detailing the changes. On June 1, 2004, all ASEDS employees were provided access to the details of the approved changes via FSANet. On June 3, 2004, AFGE (union) officials presented a demand to bargain on the changes that we will be making through our approved changes. FSA HR and ASEDS management are continuing to work together to fulfill our bargaining obligations. 94 % 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.

6/25/2004 The Draft Human Capital Plan is in the final phases of editing and will be presented to the Chief Operating Officer during the week of June 28, 2004. On June 24, 2004, WSS managers presented it's FY05 funding request in support of the Human Capital Plan to the Decision Support Group (DSG). 75 % Green

6/10/2004 On 6/3/04 we met with the Partnership for Public Service, Terri Shaw, Bill Liedinger, and Viki Trietsh to apprise them of our proposals for FSA's Human Capital Plan and to ensure alignment with the Departments efforts. Additionally, we are considering FSA's and the Departments participation in pilot to improve the hiring process. We will complete a comprehensive outline early next week and begin the process of writing the plan in the coming weeks. 70 % Green

55 AWSS Perform facilities management activities.

55.3 Administer records management.

6/21/2004 Completed after bi-weekly report submitted on 06/10/04. 100% Complete

6/10/2004 Thus far, 99% of the reports have been submitted for review and approval by OCIO and NARA instead of the 95% that was reported previously. 99 % Green

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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.							
			6/25/2004	Received comments from Pam Eliadis on Friday, June 18th and submitted Revision 1 of 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis on Wednesday,				63 %	Green	
			6/18/2004	Met with Pam Eliadis on Thursday, June 10th to review deliverable 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis. Comments are due on this deliverable by Friday, June 18th.				60 %	Green	
			6/14/2004	Submitted deliverable 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis on Friday, June 4th.				57 %	Green	
		61.9	Develop the detail Data Quality Execution Plan.							
			6/25/2004	Held meeting on June 22nd to discuss how data standards fit into the data quality process, and review material discussed from the meeting with EPA on Tuesday, June 15th.				63 %	Green	
			6/18/2004	Received approval from Jane Holman on deliverable 152.1.10a Data Quality Management Support Report I. Still waiting on the signed cover letter				60 %	Green	
			6/14/2004	No Change.				57 %	Green	
		61.10	Develop a holistic XML Management Plan.							
			6/25/2004	Continued supporting the XML Registry/Repository in production.				58 %	Green	
			6/18/2004	Received approval from Holly Hyland on deliverable 152.1.8 XML Registry/Repository Production Readiness Review (PRR) Report. Still waiting on the signed cover letter.				55 %	Green	
			6/14/2004	Successfully deployed the XML Registry/Repository to production on Sunday, June 6th. The PRR for this release was conducted on Thursday, June 3rd.				52 %	Green	
		61.11	Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.							

<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>				
			6/25/2004	No Change.	65 %	Green
			6/9/2004	In the next couple of months the following will occur: Finalize analysis of the effectiveness of current SSIM algorithms for correction sources. Begin to modify the SSIM algorithms to implement findings, and provide possible solutions to exception conditions. Additionally, begin to analyze the change notification process, with emphasis on the volume of notifications that will be generated, and automation necessary to maintain current functionality.	60 %	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.				
			6/25/2004	Contracts - Nothing new to report. Development - Nothing new to report. Infrastructure - Data communications circuits and the call center integration network routers will be delivered before June 25th. The Sprint circuit will be connected June 25, 2004. The goal is to finish most of the circuit/router connect by July 23, 2004 (the Sprint connect will be completed July 26, 2004). FSA/CSB team will continue work on the Network management capabilities plan. Operations - Nothing new to report. Oversight - The business case for CSB was presented to the IPC on May 26, 2004 and the IPC approved the request for additional funding for FY04 and initial funding requests for FY05 and FY06. IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new CSB implementation schedule. Once the plan is complete, Borrower Services staff will review it for final approval. The plan will be used for the assessment for the rest of 2004.	60 %	Green
			6/9/2004	Contracts - Project Phases 1 and 2 have been re-base-lined. Phase 3 is on track for the original implementation date. Development - Phase 1 development continues with Release 1, 2, and 3 in testing. We await the FRD for Release 4. Infrastructure - Data communications circuits have been ordered. The FSA/CSB team is now planning for Network management capabilities. Call center integration is proceeding with some delivery issues with network routers. This issue has been escalated. Operations - A Spanish language LC website is in system testing and should move to production within the next few weeks. Oversight - On May 26, The IPC approved the additional funding request for FY04 and initial funding requests for FY05 and FY06. IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is working on the project plan to align it with the new schedule. Once the plan is complete, Borrower Services staff will review it for final approval.	50 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			<i>%Complete</i>	<i>Status</i>	
		<i>Milestone#</i>	<i>Action Item</i>	<i>Status</i>	<i>Date</i>	<i>Comments</i>	
63	ADS		Improve school partner oversight.				
		63.1	Implement Integrated Partner Management (IPM) system.				
				6/25/2004	See milestone 63.6 for details on the conceptual design of the IPMS by the ILSC contractor, Grant Thornton.	80 %	Green
				6/11/2004	See milestone 63.6 for details on the conceptual design of the IPMS by the ILSC contractor, Grant Thornton.	76 %	Green
		63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system.				
				6/25/2004	Proposal received from ILSC (Grant Thornton) on 6/23/2004. Proposal is being reviewed.	80 %	Green
				6/11/2004	Draft statement of objective was sent to Grant Thornton on 6/7/2004.	76 %	Green
		63.8	Procure the design of a workflow tool for SEC.				
				6/25/2004	Report has been issued from FEBI requirements. Report will be reviewed within the next 2 weeks.	73 %	Green
				6/11/2004	Pending final FEBI/Data Strategy report.	70 %	Green
70	ADS		Increase Student Financial Aid program awareness.				
		70.1	Expand federal student aid awareness and outreach program.				
				6/25/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	80 %	Green
				6/10/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. New Milestone to be developed. Market research is complete. Results currently being analyzed.	80 %	Green
		70.2	Develop and implement long-term mass marketing strategy.				
				6/10/2004	COO briefed on Federal Student Aid Integrated Enterprise Communications (FSAIEC) draft SOO. SOO revised based upon feedback and is before the Contracts Review Board for approval.	50 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Milestone#</i>	<i>Action Item</i>		
			<i>Status Date</i>	<i>Comments</i>	

71 ADS Reengineer EDEExpress.

71.3 Implement Return to Title IV Web Release.

6/25/2004 The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th and posting on September 12th. 95 % Green

An adjusted date for project completion has been requested, based on the revised schedule. We request that the completion date be changed to September 30th.

Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August.

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 the fall of 2004.

6/10/2004 The list of issues has been agreed upon with the contractor. Pearson will be providing a schedule for review of appropriate documents based on new requirements, including detail design documents and a schedule for development, system testing and Acceptance Testing. An adjusted date for project completion has been requested, based on the revised schedule. Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. 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 the fall of 2004. 95 % Yellow