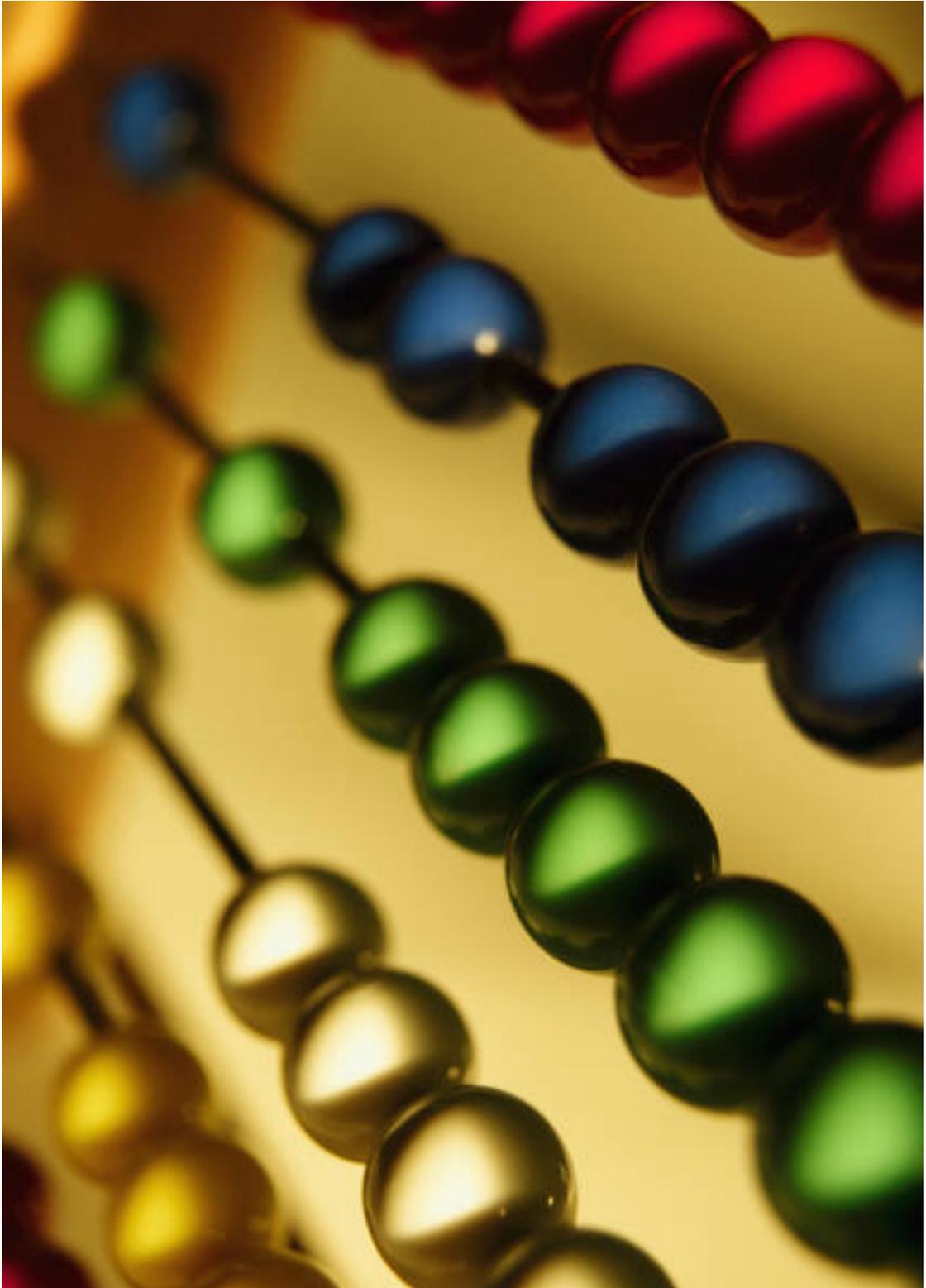


Bi-Weekly Report as of August 20, 2004



FSA Performance Plan – FY2004

SUMMARY

COMPLETED PROJECTS

- Participation in Direct Loans electronic services has increased because of a number of new promotional activities. For FY 2004 electronic bill presentment increased 59%, electronic correspondences increased 64%, online payments increased 57% and electronic debit accounts increased 12%. This closes out Project 14 (*Implement plan to provide high quality customer service to the Direct Loan portfolio*).
- FSA has established an enterprise process devoted to capturing best practices in monitoring and measuring vendor performance, completing Project 47 (*Implement enterprise contract performance monitoring measures against new systems contract awards*).
- FSA has exceeded the FY 2004 goals to increase contract dollars awarded to small businesses (*Project 49*). In addition to satisfying a project included in the FSA Performance Plan, it also fulfills the congressional mandate and President's Management Agenda to increase procurement dollars provided to small businesses.

GREEN LIGHT

- GAO issued their draft report on August 18, 2004, and requests response by August 31, 2004. The title of the report is "Better Strategic and Human Capital Planning Would Help Sustain Management Progress." Project 53 (*Prepare and continually monitor and report on the accomplishments of the High Risk Plan*).
- FSA has recently developed FSA's Human Capital Management Plan. This Plan identifies our strengths, acknowledges our weaknesses and provides recommendations to improve management of our workforce. This milestone contributes toward the successful completion of Project 54 (*Deliver workforce development and support programs*).

YELLOW LIGHT

- Although FSA has worked toward developing procedures to ensure a timely response to policy questions, OPE has yet to provide a response. This project cannot be complete without OPE input. Project 40 (*FSA will develop procedures to ensure timely response to policy questions*).
- Project 71 (*Reengineer EDEExpress*) continues to be reported as Yellow. FSA Acceptance Testing is being conducted and a testing team has been put together and the PRR is scheduled for September 8th. The System of Records Notice has been published in the Federal Register on July 23, 2004 and the 40-day comment period has begun.

RED LIGHT

- Project 52 (*Restructure integration leadership support to transition the majority of responsibility to FSA staff*) continues to be reported as Red because the establishment of an integration team is necessary if FSA is to assume integration support functions currently performed by the integration contractor. This new team has been proposed in the ASEDs reorganization package which has yet to be approved. There is insufficient time to fully accomplish this action item before the end of the fiscal year.

ACTION PLAN STATUS AT A GLANCE

as of August 20, 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 August 20, 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	G
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	G
16.1	Perform cohort default rate calculations, send, and post	G
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	G
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	G
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	G
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	G
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	G
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	G
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	G
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	G
20.1	Monitor and evaluate web page hits to drive future postings to portal	G
20.2	Maintain current and relevant information to financial partners' user community	G
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	G
22.1	Perform cost neutrality analysis and provide results	✓
22.2	Prepare performance measure assessment and benchmarking reports	G
22.3	Evaluate new applications for VFA	✓
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	G
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)	G
25.1	Participate and provide Financial Partners Channel support for ED audit	G
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	G

ACTION PLAN STATUS AT A GLANCE

as of August 20, 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	G
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	G
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	G
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	G
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	Y
30	MANAGE FMS OPERATIONS	G
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	G
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	G
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	G
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	G
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	NR
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	G
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	G
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	G
39	CONDUCT REAUTHORIZATION ACTIVITIES	G
40	POLICY LIAISON PLACEHOLDER	Y
41	PLAN AND MANAGE FSA CONFERENCES	✓
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	G
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	G
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	G
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	G
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	cancelled
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	G
48.1	Establish monitoring and reporting process for government furnished property	✓
48.2	Establish reporting process to monitor vendor performance	G
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	G
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	cancelled

ACTION PLAN STATUS AT A GLANCE

as of August 20, 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	cancelled
64	IMPROVE THE ACCURACY OF APPLICANT DATA	

ACTION PLAN STATUS AT A GLANCE

as of August 20, 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	G
69	PROVIDE CAREER ZONE SERVICES	G
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	✓
70.2	Develop and implement long-term mass marketing strategy	G
71	RE-ENGINEER EExpress	Y
71.1	Conduct A & F Study with product registration	✓
71.2	Link application processing to FAA Access	✓
71.3	Implement Return to Title IV Web Release	Y
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	cancelled
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	✓
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

Key:

- G On Track
- Y Progress Concerns
- ? Progress Concerns by EPMS
- NR Not Reported
- R 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>	8/20/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have exceeded their success measures. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion on or before 9/30/04.	65%	Green
			8/6/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have exceeded their success measures. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion on or before 9/30/04.	60%	Green
2	ADS	<i>Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).</i>	8/20/2004	See milestone for progress report.	95%	Green
			8/6/2004	<p>Replace Current IFAP Search Engine with Google -- This is an on-going project managed by FSA's OCIO. The current expectation is that the new hardware and software will be available by August 29, 2004 to our web maintenance contractor (Indus). They in turn are expected to complete their part of the implementation by September 20, 2004. We were originally expecting this to be completed in FY 05 (and there is still a chance that that may happen). But it is fairly certain that the new search engine will be fully operational before the EACs in November and December.</p> <p>General progress continues in all identified areas. Of particular note, the Google servers arrived this week and should be transitioned by the end of the 2004 calendar year.</p>	85%	Green
8	ADS	<i>Expand eZAudit initiative.</i>	8/20/2004	<p>The recomplete for this contract (including the merging of the DRCC and the eZaudit functions) is in the due diligence phase (answering questions from vendors and conducting interviews). This phase will be complete 9-27-04. Proposals will be due from vendors on Sept 8.</p> <p>As of 8-15, 4,502 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed milestone 2, but will continue to report on volume of submissions rec'd through the end of the year.</p> <p>Over 90% of all schools have registered.</p>	92%	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>		
		8/6/2004	As of 8-1, 4,502 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed milestone 2, but will continue to report on volume of submissions rec'd through the end of the year. Task order awarded July 30. Over 90% of all schools have registered.	90%	Green
9	ADS		<i>Enhance program monitoring and oversight.</i>		
		8/20/2004	Milestone 1 Yellow For the biweekly period 8-2-04 to 8-15-04, 74% of the audits were resolved on time. Cumulative since 10-01-03, 93% of the audits were resolved on time. We processed more paper audits, and these are causing the decline in the percentages. FSA still is receiving some audits in paper and we are working with schools to get all schools to submit their audits through eZ-Audit as the current regulation requires. We are continuing to monitor this closely. There are 10 audits on administrative stay. The IPD (Institute for Professional Development) Schools have signed a settlement agreement and paid \$4,442,076. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 10 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one quarter of 1 percent. Milestone 2 We briefed OPE on 8-16 on the FY 2004 Compliance Initiative. They are reviewing the training materials. Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 50%. Schools & locations without required profiles is down from 2,356 on 3/17/2004 to only 1,114 on 8/13/2004. Milestone 3: Work Continues on the HBCU Perkins default list with meetings with the Campus based workgroup. Milestone 4: We have concluded the planning meetings and action plan for delivering the next version of the on-line reporting templates for academic year 2003-04 by September 30, 2004. Milestone 5: conducted 17 ISIR Analysis Tool sessions as of August 20, with 2 make-up sessions scheduled before the end of August 2004. Milestone 6: Progress continues to be made on the vulnerability assessment. Data gathering interviews and research concluded this reporting period, and work began on an outline for the report and action plan. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.	84%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		8/6/2004	1:	For the biweekly period 7-19-04 to 8-1-04, 99% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.	81%	Green
			2:	The dry run training for the FY 2004 Compliance Initiative was conducted on 7-27 & 28. SEC briefed Management Council on 8-2-04. Next steps include briefing OPE and OGC on 8-12.		
			3:	School Relations Continues to make progress with a partnership with Campus Based with research on HBCU Perkins default.		
			4:	CIO has agreed to fund the updates to the reporting mechanism for the next cycle of data submission		
			5:	ISIR Analysis Tool training is underway.		
			6:	Work this reporting period included a status briefing to the ASEDs management council and additional interviews and working meetings with subject matter experts. Work to identify vulnerabilities and potential mitigation strategies associated with student identification and authentication continues. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.		
10	ADS	<i>Produce school publications and materials.</i>				
		8/20/2004	Milestone 1:	The Student Aid handbook has had a date change and is still awaiting finalization and approval.	80%	Green
			Milestone 2:	The PLUS Basics brochure has been approved by OPA and is now beginning the print process. Expected delivery to the EDS Warehouse is late September 2004. The students brochure is out to a professional proofreader before it is sent to OPA. There are 81 back-ordered requests for publications or documents at the warehouse. The majority of these requests continue to be for the out of stock Direct Loan PLUS Basics brochure that is currently being revised, and a few are for the students brochure.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		8/6/2004	<p>1: The FSA handbook has requested a date change at the milestone level due to new requirements that they are encompassing. The project was initially delayed because it has a new scope from the previous years and getting it through the proper channels took longer than expected. It is believed that the project will be finished by the new projected date.</p> <p>2: The PLUS Basics brochure is being reviewed by OPA. The students brochure is out for review and comment. There are 73 back-ordered requests for publications or documents at the warehouse. The majority of these are for the Direct Loan PLUS Basics brochure that is currently being revised, and a few are for the students brochure.</p>	78%	Red
13	BS		<i>Enhance program monitoring and oversight.</i>		
		8/23/2004	<p>Total non-consolidation recoveries have now reached \$1.38 billion and increase of 23 percent over the same period, August 6 in 2003. This figure represents 8.67 percent of the FY04 portfolio balance.</p> <p>There is nothing to report on default prevention activities and the Lifetime Default Rate Measure at this time.</p> <p>The Vulnerability Assessment is complete. The results from the vulnerability assessment will be used in FY05 to assist with testing and security issues relevant to CSB development and implementation.</p> <p>The goal to increase the cure rate on 180 days plus delinquent loans by 1 percent over FY2003 was achieved in April 2004. The goal for FY2004 is 55.1 percent. The actual rate for July 2004 was 60 percent.</p>	93%	Green
		8/10/2004	<p>Total non-consolidation recoveries have now reached \$1.361 Billion, an increase of 24 percent from the same period, thru July 30th, in FY03. This represents 8.55 per cent of the FY04 portfolio balance.</p> <p>The Default Prevention Workgroup met on July 30 and reached agreement on strategies, strategy owners, and the tracking of initiatives. A new strategy for Fraud Prevention was established and will include verification processes for FASFA and Conditional Disability claims. A notebook was created on a shared drive to permit strategies and action steps to be updated as needed and to provide an electronic notebook for outside entities (i.e. GAO) to review FSA efforts to reduce the high-risk status.</p> <p>The Independent Verification and Validation (IV&V) team has delivered the plan for review of the CSB project. The major areas that will be reviewed and monitored are Requirement Management Process, Risk Management, Change Management, Test Process, Security Risk Assessment and Certification and Accreditation Support, Review Financial Controls, Production Readiness Review recommendations, and Maintainability Assessments. Each of these areas will be reported on the FY05 performance plan.</p>	91%	Green
14	BS		<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</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>																										
		8/20/2004	Participation in Direct Loans electronic services has increased considerably during FY04. This is because of a number of new promotional activities including: strategically placed banner advertisements and messages on the DLSS web site, email messages to borrowers, and, when appropriate, customer service representatives explain the new services. Following is the data for each service area.	100	Completed																								
			<table border="1"> <thead> <tr> <th></th> <th>FY03</th> <th>FY04</th> <th>Percent Increase</th> </tr> </thead> <tbody> <tr> <td>Electronic Bill Presentment</td> <td>53,792</td> <td>85,714</td> <td>59.3%</td> </tr> <tr> <td>Electronic Correspondences</td> <td>100,014</td> <td>164,442</td> <td>64.4%</td> </tr> <tr> <td>Online Payments</td> <td>119,316</td> <td>186,886</td> <td>56.6%</td> </tr> <tr> <td>Electronic Debit Account EDA</td> <td>606,714</td> <td>679,090</td> <td>11.9%</td> </tr> <tr> <td>Increase of overall Services</td> <td>879,836</td> <td>1,116,132</td> <td>26.9%</td> </tr> </tbody> </table>		FY03	FY04	Percent Increase	Electronic Bill Presentment	53,792	85,714	59.3%	Electronic Correspondences	100,014	164,442	64.4%	Online Payments	119,316	186,886	56.6%	Electronic Debit Account EDA	606,714	679,090	11.9%	Increase of overall Services	879,836	1,116,132	26.9%		
	FY03	FY04	Percent Increase																										
Electronic Bill Presentment	53,792	85,714	59.3%																										
Electronic Correspondences	100,014	164,442	64.4%																										
Online Payments	119,316	186,886	56.6%																										
Electronic Debit Account EDA	606,714	679,090	11.9%																										
Increase of overall Services	879,836	1,116,132	26.9%																										
		8/10/2004	The figures for e-servicing will be available mid-August.	80%	Green																								
15	BS		<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>																										
		8/20/2004	The statistic for the 20% reduction in overpayments and the 10% reduction in underpayments are received monthly. The next report on this item will be available mid-September.	90%	Green																								
		8/10/2004	The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for the month of July. The target for overpayments for FY04 is \$2,265,585; the actual dollar amount in July 2004 was \$1,815,994. The target for under payments for FY04 is \$778,092; the actual dollar amount was \$536,716. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month thru September 30, 2004.	90%	Green																								
16	FPS		<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>																										
		8/20/2004	NSLDS Maintenance and Operations Activities operating efficiently. July benchmarks were reviewed and distributed. Work continues on GA and Lender Reasonability and the Vulnerability Study.	90%	Green																								
		8/6/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work continues on GA and Lender Reasonability.	88%	Green																								
19	FPS		<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>																										
		8/20/2004	The contractor deployed all issues related to Guaranty Agency data.	95%	Green																								
		8/6/2004	The Contractor continues to provide on-going maintenance support. Reports for this reporting period have been submitted.	92%	Green																								
20	FPS		<i>Perform Financial Partners Portal operations activities.</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>			
		8/20/2004	The contractor continues to provide on-going maintenance support. The contractor deployed several changes the week of August 8th. The changes are: * the Lender Reporting Systems Customer Satisfaction Survey was removed from the portal, * old Interest Rates were removed from the Interest Rate Page and replaced with the current Interest Rate, and * all font irregularities were corrected on the Publications page	98%	Green	
		8/6/2004	The What's New template has been deployed. The Contractor continues to provide on-going maintenance support.	97%	Green	
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>				
		8/20/2004	Targeting Tuesday, 9.7.2004 for publication of the first report of results of performance against established VFA benchmarks. Accelerating goal to publish the timeframe tracking report for evaluation of new VFA's to Friday, 9.24.2004.	97%	Green	
		8/6/2004	Progress on the Performance Measure milestone for performance assessment and benchmarking reports has been impacted by the additional data requests from Ernst & Young in support of maintaining our clean audit opinion. Working to address the impacts so that a test Benchmark report can be published by 9.5.2004. The VFA Evaluation processing timelines document is complete and the annual report tracking processing timeframes will be published on Friday, 10.1.2004 as scheduled. This will cover processing for the Colorado, Missouri, NSLP/EAC, and USAF applications.	96%	Green	
25	FPS	<i>Enhance program monitoring and oversight.</i>				
		8/20/2004	* The GAs continue to provide additional data and explanations as requested by Ernst & Young (E&Y). * Reviews at the Iowa and New Hampshire guaranty agencies were completed. Reviews at the Tennessee and North Carolina guaranty agencies are proceeding. * A review of the NIST vulnerability matrix is scheduled for Monday, 8.23.2004.	90%	Green	
		8/6/2004	* FP has received the three additional months of GA subrogation and receivable data from the GAs as requested by Ernst & Young (E&Y). * Reviews at the Iowa and New Hampshire guaranty agencies are at midpoint. A revision of the Compilation of Servicer Review Findings and Observations was released. * Work continues on the NSLDS vulnerability assessment. Work is currently at midpoint and continues to be on track for completion no later than Thursday, 9.30.2004.	85%	Green	
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>				
		8/20/2004	The audit is coming into the home stretch, as a large number of Provided by Client (PBC) items have been delivered to E&Y. Many of the upcoming items will have an even more accelerated due date so that the audit can be completed earlier this year. Overall, the audit is proceeding well.	80%	Green	
		8/6/2004	A significant amount of financial statement audit material has been provided to our IPA's, E & Y year-to-date. July was our heaviest PBC month, as we provided a hugh amount of information during the month of July. Next week E&Y will complete it's final site visit, to Raytheon for Debt Collection processes.	75%	Green	

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27	CFO	<i>Award contract to perform independent system internal control reviews to enhance financial management." In addition, the new Success Measure should be changed to read: "Award contract by September 30, 2004.</i>				
		8/20/2004	FSA has completed its final technical evaluation based on the final proposal(s) for the System Internal Control BPA and task order 1 (FMS Review) under that BPA. The SOO and IGCE for task order 2 (CSB and Other System Reviews) will be delivered to Contracts so that it is ready for issuance to the BPA awardee.	75%	Green	
		8/6/2004	On July 28th, the IPC approved a scope change to this project. It was agreed to change from completing 2 system internal control reviews to completing the contract award for the internal control review. We are continuing to negotiate with bidders regarding a BPA and Task Order 1 (FMS review). In addition, we are finalizing the SOO and IGCE for Task Order 2 (CSB and other system reviews). The BPA and both task orders are expected to be awarded by the end of the fiscal year.	60%	Green	
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>				
		8/20/2004	We continue to make modifications to the FY2003 model to address allocation issues identified in recent meetings. We will present the FY2003 model in its current state to the Management Council on Friday, August 20th.	75%	Green	
		8/6/2004	We have completed data gathering meetings with FSA program staff in all FSA divisions to verify organization structure, activities, and allocation methodologies. We are now making modifications to the FY2003 model to address issues identified in those meetings. The presentation of a completed FY2003 model to the Management Council was postponed from 7/30/2004 to 8/20/2004 to accommodate the required changes from the program staff meetings and additional review time by the steering committee. We feel confident that this project will be successfully completed by the end of the fiscal year.	68%	Green	
29	CFO	<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>				
		8/20/2004	Monthly Reconciliations: Reconciliations for July 2004 have been completed in 13 days compared to the 30-day performance standard.	45%	Yellow	
			Reconciliation Reengineering Project: FSA has accepted EDS' proposal. This will move the contracting vehicle to the Oracle 11i contract. CFO anticipates the contract to be awarded within the next week which will significantly change the status of this project.			
			Other: Production Environment for Checkfree - The production server has been delivered to the VDC, but it is not yet up and operational. FSA CFO and CIO are collaborating together on the technical and functional aspects/requirements. Specifically, CFO/AD is continuing to determine the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations. FSA/CIO is assisting with the technical aspects of the project. Additional training from Checkfree is scheduled for the week of August 23rd.			

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		8/6/2004	<p>Monthly Reconciliations: Reconciliations for July 2004 are currently being performed and are expected to be completed timely.</p> <p>Reconciliation Reengineering Project: Financial Management Group/AD has requested to move the contracting vehicle to the Oracle 11i contract. This request was submitted to Contracts in early July and is still awaiting approval.</p> <p>Other: Production Environment for Checkfree - The production server has been delivered to the VDC, but it is not yet up and operational. FSA CFO and CIO are collaborating together on the technical and functional aspects/requirements. Specifically, CFO/AD is continuing to determine the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations and FSA/CIO is assisting with the technical aspects of the project. A Checkfree representative came to ED on 7/26 to work with FSA/CFO and respective contractor staff to set up the FMS to FMSS reconciliation, which will be performed subsequent to the completion of the July reconciliations. Additional training from Checkfree is scheduled for the week of August 16.</p>	43%	Yellow
30	CFO	<i>Manage FMS operations.</i>			
		8/20/2004	FMS Operations continues to run smoothly. There were 10 change requests to be implemented in 8/22 FMS Release. FMS Operations staff completed first draft of system year-end closing schedule for distribution and validation.	89%	Green
		8/6/2004	FMS Operations continues to run smoothly. A post implementation review was completed for the Form 2000 enhancement task orders, citing high ratings (5 out of a possible 5) in most of the review categories. Also, the July 2004 accounting period was closed within 2 business days, once again meeting the metric for closing time and allowing more time for the reconciliation teams to tie FMS balances to operating partner and general ledger balances.	86%	Green
31	CIO	<i>Develop and deploy Enterprise Performance Test Architecture.</i>			
		8/20/2004	Ombudsman – Testing is complete and the final analysis and report has been delivered to the customer. eMPN – eMPN scripting is scheduled to begin this week. FAFSA GC – FAFSA GC was closed but after discussions with PPS some additional tests are being scheduled. FAFSA 9.0 – FAFSA planning is on schedule to complete the test plan by August 27th. Scripting has begun on Framework, PIN and FAA. There is still some push back from the CPS team (Pearson and CSC) on who should dictate what processes are run during FAFSA 9.0 testing. Library – Forrest is being deployed in shared directory.	89%	Green
		8/13/2004	FAFSA GC Issue Testing is wrapping up final report is being written. Testing is complete for Ombudsman final report is being written. Planning and scripting activities are being performed for eMPN. EMPN test plan is complete. FAFSA 9.0 Test planning is proceeding.	87%	Green
		8/6/2004	FAFSA GC Issue Testing is wrapping up. Testing is complete for Ombudsman, FP Portal, and Schools portal. Planning and scripting activities are being performed for eMPN. FAFSA 9.0 Test planning is proceeding.	85%	Green
		7/30/2004	FAFSA GC Issue Testing continues. Final tests will be performed this week. Scripting is complete for Ombudsman, FP Portal, Schools portal. Base line tests have been performed. Planning and scripting activities are still being performed for SAIG and eMPN.	82%	Green
32	CIO	<i>Provide Enterprise and Data Architecture management.</i>			

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		<i>Status_Date</i>	<i>Comments</i>		
		8/20/2004	The EA team supplied the ILSC team with documented standards and principles in preparation for the Business Process Modeling activity in WebSphere Business Integration. The EA team created an EA Approval Form required to reinforce tracking of IT investments through Enterprise Architecture and Investment Management alignment. The form will implement a tracking summary for FSA Enterprise Architecture Standards changes and will be included in IPC Status Reports. The EA team met with the ILSC team to discuss the use of Popkin System Architect. Discussions will focus on userids/passwords and potential changes to the meta-model and USRPROPS. The ILSC is proposing to use System Architect for its Data Modeling needs.	89%	Green
		8/13/2004	Follow-up questions to OMB have been posed to obtain clarification on how best to properly align FSA's funding request relative to Service Component Reference Model (SRM) selections and to clarify whether the Technical Reference Model (TRM) has been adjusted for FY 2006 or not. Follow-up with business process owners is expected to involve refinement of SRM selections, clarification of selections relative to actual applications and mapping of SRM selections to TRM items via applications. Discussions continue with the Department's Enterprise Architecture Team as we further refine our integration efforts, specifically in the area of documentation and meeting the September Documentation Submission requirements to OMB. The Department has adopted FSA's strategy to use ClearCase and the teams are focused on building a consolidated release.	87%	Green
		8/6/2004	A presentation was given to the Institute for Defense and Government Advancement titled "Re-Drawing the Federal IT Landscape with Effective Federal Enterprise Architecture Reference Model Implementation" with a focus on how FSA implemented / maintains the OMB' reference models. The presentation stimulated questions and some concern was raised regarding OMB's expectations to using EA in preparing budget submissions. A Community of Practice will begin with DOE and DOI. The EA Team is preparing an estimate to implement the process of entering Exhibit 300 data into an excel spreadsheet which can then be auto-translated to XML for delivery to eCPIC and to OMB. All EA Review Reports have been submitted to Steve Allison and the Standards Guide has been revised for 2004. The percentage complete for this project has been increased significantly to better align with the 9/30/04 end date for this on-going project.	85%	Green
		7/30/2004	The EA Team supported ED/CIO in a presentation to the Inspector General on progress being made with Enterprise Architecture. The ILSC team will be performing their data modeling task in Popkin Systems Architect. The EA team is working to provide the ILSC team with access to the Popkin Repository and their own Data Modeling "sandbox". EA is providing a "proof of concept" demonstration to Steve Allison (CPIC) on entering Exhibit 300 data into an excel spreadsheet which can then be auto-translated to XML for delivery to eCPIC and to OMB. This would allow the EA team to export the EA reference model information from Popkin in an XML format to the eCPIC tool for end-user validation. Once validated, the EA team can import validated reference models into Popkin. The EA team is contacting the ED/CIO ITIM team to determine feasibility of importing FSA EA data into the eCPIC tool.	52%	Green
33	CIO		<i>Provide security and privacy support to FSA business units.</i>		
		8/13/2004	Working with systems to complete inventory worksheets and corrective actions for previous audits and reviews. For C&A, we have worked with systems to coordinate scanning at the VDC and for DLSS. Contract is expected to be awarded this week.	90%	Green
		8/6/2004	Contracts working towards award for BPA with expected award next week. Continuing working C&A validation efforts for all FSA systems.	90%	Green

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		<i>Status Date</i>	<i>Comments</i>		
		7/30/2004	Final decision on the BPA given to contracts. contract award in progress. Currently involved in the DLSS, VDC C& A processes.	75%	Green
34	CIO		<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>		
		8/20/2004	ITA: ITA responded to one production page and three maintenance service requests this week. We have corrected all issue with Student Aid on the Web and Financial Partner Portal that prevented the completion of their migration to WAS 5.0; they are now ready for their 8/22 DNS change. We also are on schedule for the migration of FAFSA to WAS 5.1.1. EAI: This week, EAI responded to 18 COD customer service inquiries and 4 CIO service inquiries. EAI continues to monitor the rollout of the EAI Security Exit and MQ Series Channel Listener Upgrade. Testing for eMPN was moved forward and began this week.	88%	Green
		8/13/2004	ITA: No major production problems were reported during the week; the team responded to 2 maintenance service requests. Schools Portal has gone live in it's WAS 5.0 environment; Financial Partners Portal and Student Aid on the Web were delayed after testing indicated problems with Interwoven deployment to their 5.0 environments. These apps will go live 8/22. Also, we have prepared a migration plan for moving FAFSA to WAS 5.1. EAI: No major production problems were reported during the week; the team responded to 7 COD customer service inquiries. The team is monitoring the fulfillment of the ECMs to implement the EAI Security Exit and MQSeries Channel Listener Upgrade. The team continues to provide extensive support to COD for batch reconciliation efforts.	87%	Green
		8/6/2004	ITA: The team responded to one ITA production support page and 6 maintenance service requests. Students Portal, Financial Partners Portal, and Student Aid on the Web have been successfully installed in their WAS 5.0 production environments. We have presented PEPS with requirements for their proposed migration to ITA. We have completed WAS 5.1 development and test environments for FAFSA. EAI: No major production problems were reported during the week; the team responded to 22 COD customer service inquiries. ECMs have been submitted to implement the EAI Security Exit and the MQSeries Channel Listener upgrade. EAI is developing a VDC resource request package for the installation of IBM WBI Message Broker and the upgrade of DataIntegrator.	84%	Green
		7/30/2004	ITA: The team responded to one ITA production support requests and 5 maintenance service requests. While we await FSA purchase of the necessary Interwoven license, we are preparing an architectural paper on the direction FSA should proceed with Interwoven. After a third meeting with the PEPS team, we committed to providing a document listing requirements for what it would take to include PEPS in the ITA. We are making significant progress with the FAFSA performance testing in trying to discover the cause of garbage collection issues. EAI: No major production problems were reported during the week; the team responded to 29 COD customer service inquiries. EAI has made changes to implement MQSeries Channel Listener; it will be rolled out into production in phases over the next 5 weeks. EAI met with CSB to clarify our role in provide consultant support. As part of the plan to migrate eMPN to the ITA environment, EAI worked to configure the ITA test environment to receive the PEPS daily feed.	82%	Green

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		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
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>			
		8/20/2004	Held eZ-Audits PIR Security Analysis introductory meeting with Barbara Johnson, eZ-Audits System Security Officer (SSO), and Perot Systems on August 19. CSB IV&V support team continuing to review and compile comments for CSB Phase I Test Plans, Test Reports, and Test Scripts. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	88%	Green
		8/13/2004	Conducted Post-Implementation Review (PIR) out-brief on FMS FY03 project on August 6, and accepted delivery of final FMS FY03 PIR on August 9. PIR team is currently analyzing eZ-Audits, Release 1, with an anticipated delivery date of October 8. The QA and CSB project teams are reviewing the IV&V Monthly 'Roll-Up' report for all July 2004 QA / IV&V activities. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	87%	Green
		8/6/2004	No change.	85%	Green
		7/30/2004	Conducted first In-Process Review (IPR) for the CSB development team on July 29. IPR focused on IV&V issues of high risk to project success or development areas that demonstrate weak processes. Post-Implementation Review (PIR) for eZ-Audits, Release 1 kickoff was conducted on July 28. PIR vendor re-compete and selection process is underway at this time. QA Team accepted the IV&V support plan for the CSB development effort on July 28. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	83%	Green
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>			
		8/20/2004	On August 11, OMB provided agency CIOs with planned E-Gov initiative budget requirements for FY05 and FY06. The eLoans partner agencies (including ED) are required to earmark \$400,000 each in FY05 (\$2 million total) and \$0 each in FY06. The eLoans initiative's total FY05 budget requirement of \$2 million equals just 1% of the total funding requirements of all the E-Gov initiatives (\$186 million). On August 12, ED/FSA/CIO and ED/OCIO/Information Assurance (IA) representatives met with staff from the E-Authentication Project Management Office (PMO) to discuss Education's recently submitted Ramp-up Plan/Data Call. GSA's PMO offered some staff support in conducting a workshop on the E-Authentication Risk and Requirements Assessments that Education must complete by December 15, 2004. FSA/CIO and ED/OCIO are in the planning stages for completing these risk assessments.	88%	Green
		8/13/2004	Harvard's Kennedy School of Government, National Center for Digital Government interviewed ED's eLoans team on August 10 as part of an OMB-sanctioned study on the elements of and challenges to an interagency collaboration. OMB's E-Gov Office cleared Harvard's questions and our draft responses. Questions and draft responses were also shared with Marianna O'Brien in FSA Communications. Harvard plans on conducting follow-up interviews with a couple partner agency leads and will share a draft of the study when it's available. Students.gov received 61,113 visits (1.4 million hits) during the week of August 1 - 7. In July 2004, 243,681 visitors (5.76 million hits) came to students.gov.	87%	Green
		8/6/2004	Harvard's Kennedy School of Government, National Center for Digital Government is conducting an independent study of the 25 E-Gov initiatives to better understand the elements of and challenges to success in interagency collaboration. OMB's E-Gov Office sanctioned the E-Gov initiatives' participation in the study and asked the E-Gov initiative program managers to complete an online survey (completed in May 2003) and participate in interviews (completed in October 2003 and February 2004). As a follow-up to the initial data gathering, Harvard provided follow-up questions and scheduled an interview with ED's eLoans team for August 10. In preparation for the interview, a copy of the questions and draft responses have been provided to OMB's E-Gov office, as well as FSA Communications.	85%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
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		7/30/2004	As of July 26th, 15,332 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov. The August edition of InfoSource was sent to list subscribers on July 28. Students.gov received 56,740 visits (1.4 million hits) during the week of July 18 - July 24, 2004.	83%	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>			
		8/20/2004	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 1.71 (through 8/13/04)	88%	Green
		8/6/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.70 (through 7/23/04)	83%	Green
39	PL	<i>Conduct reauthorization activities.</i>			
		8/20/2004	FSA's legislative recommendations continue to be prepared for submission to OPE.	90%	Green
40	PL	<i>FSA will develop procedures to ensure timely response to policy questions.</i>			
		8/20/2004	Although FSA has worked toward developing procedures to ensure a timely response to policy questions, we are not getting a response from OPE. We can not complete this project without their input.	20%	Yellow
42	CMS	<i>Manage, develop and update content for FSANet.</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>		
		<p>8/20/2004 Words from contractor Robert Wehrle: This is the problem. WebTrends is very dependent on the source Ip addresses of the FSA User. In the past few months, we have had several ITA architectural changes. Going to WebSphere 5.0, going to Css from Network Dispatcher. It appears that some Css configuration changes that make WebTrends work have not been applied to the Intranet side, They were applied to the Internet side. In particular, the IP Address 4.20.17.169 is the culprit. If you look at the Visitors section, we have a huge amount of traffic from this ip address. This ip address is the intranet side of the CSS interface. Configuration changes need to be made to the CSS to ensure you get the accurate ip addr of the FSA User, also configuration changes need to be made to Web Trends to filter this server out. I am currently working with Richard Kelpen of CSC to make these changes. I dont think we are going to be able to recover the data from past months. If we had the FSA user ip addr, it might be a different story but since it is all reflected as 1 ip address its doubtful.</p> <p>I am going to submit a CSS break fix ticket for this sunday to correct this information. I will keep you informed as to the progress. This may take a couple days to a week to completely clear up. But as we correct things we need to be looking at Web Trends on a daily basis to scrub the data and feel good and whether we have any other problems.</p> <p>AS OF 8/20/04: Just a update on the WebTrends problem for FSANet. Its actaully problem with the CSS config.</p> <p>We are still working it. Css config changes will have to occur. We need to test these changes in the stage environment. I will continue to update you.</p> <p>Robert M Wehrle - WebSphere Consulting Mobile # 919-368-4348 Email: rwehrle@us.ibm.com http://www.ibm.com/websphere/developer/services</p>	90%	Green
		8/6/2004 -The software filter is not yet fixed. Unable to provide FSANet statistics.	90%	Green
43	CMS	<i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i>		
		8/20/2004 Controlled Mail - 205 letters were completed and one is overdue.	90%	Green
		FOIA Cases - 13 new cases and closed 8 cases.		
		8/6/2004 Controlled Mail - 205 letters were handled and all are on time. Privacy cases - 2 new cases and 3 closed cases.	90%	Green
44	CMS	<i>Develop and implement internal and external communications strategy.</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>		
	8/20/2004	<ul style="list-style-type: none"> -FSA Comms received the OK from OPA to get the DL Basics for Parents brochure printed. -FSA Comms sent over and received approval to get the College Preparation Checklist brochure printed. -Monitored interview with USNWR/Kay Jacks on FAFSA and related information. -Hot Issue List to Sec. Paige on time. -Weekly Report to Sec. Paige on time. -FSA Weekly News to employees on time. -FSA Now July issue is online. -Daily newsclips on time. -FSA Comms/FSAU working with videographer on new employee orientation video and should have the 2nd draft to show by week's end. -Information Requests - To date, 352 requests have been received and 15 remain open with one on hold. Additionally, all information request e-mails have been saved to the K:/ drive so EPMS can access and organize data. A meeting is scheduled for Aug. 25 with EPMS (John Fare/Linda Hall) to discuss next steps to providing info to the public. -Lobby monitor slides updated weekly with Dashboard info. -FSA Comms met with Mark Washington to discuss comms plan for multi-building evacuation drill planned for Oct. -FSA Comms and FSAU will view the second draft of the HR orientation video on Wed., Aug. 25. 	90%	Green
	8/6/2004	<ul style="list-style-type: none"> -USNWR will interview Kay Jacks and Bill Leith on FAFSA tips, mistakes, etc. The interview is scheduled for Aug. 17. -Daily Newsclips were on time. Articles about the current financial aid scam where someone is impersonating an ED employee and offering to replace their loans with an \$8k grant. -The July issue of FSA Now was release the last week of July. -Hot Issue List to Sec. Paige is on time. -FSA Weekly News to employees is on time. -Weekly Report to Sec. Paige is on time. -Lobby Monitor. A new plasma screen is being ordered by FSA CIO. The monitor is featuring the counting down of days before the Learning Coupon expires. -FSA Communications met with OPA to discuss an exemption from PAPRS for some of our publications. OPA agreed that FSA does not "substantially revise" our pubs annually and therefore they will not be subject to the PAPRS Concept Board. -FSA Communications is working with FSAU planning a training class on our publications process. Employees will learn the new, simplified procedures and receive the writing tools in order to do an even better job. Training is tentatively scheduled for Oct. 1st. FSA Comms will work with FSA Contracts to devise standard language stating that the AP Style Guide must be used when contractors are creating/printing publications for FSA. -FSA Comms is assisting ASEDS via OPA in getting the Direct Loan Basics for Parents brochure updated and printed. 	90%	Green
46	EPMS	<i>Develop acquisition workforce.</i>		
	8/20/2004	No change from last entry.	75%	Green

<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>
		8/9/2004	The workforce continues to attend training as forecasted in the annual training plan. The ongoing training assessment and evaluation process continues to provide valuable information. The evaluation effort revealed that 75% of the individual training forecasted for FY 04 is complete or scheduled for completion by the end of the physical year. The ongoing organization re-engineering process within APCMG provides an opportunity to commit the remaining training budget. The re-engineering effort combined with other additional training, not previously forecasted, will bring this task to 100% completion by September 30, 2004 as projected.	75%	Green	
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>				
		8/25/2004	Task evaluated as complete on 8/25/04.	100	Completed	
		8/20/2004	No change from last entry.	90%	Green	
		8/9/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. FEBI is in the evaluation phase and upon award FEBI will be incorporated into the process.	90%	Green	
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>				
		8/20/2004	No change from last entry.	92%	Green	
		8/9/2004	The strategic acquisition planning and contract analysis tool (SAPCAP) database is almost complete and the redesign to SQL will enhance the databases ability to monitor contract expirations, contract types. The information extracted from the database in part will be used to monitor internal procurement control processes and produce reports for management analysis and decision making concerning key procurement issues. The database is schedule to be fully implemented by November 1, 2004.	92%	Green	
49	EPMS	<i>Increase contract dollars awarded to small businesses.</i>				
		8/25/2004	Task evaluated as complete on 8/25/04.	100	Completed	
		8/20/2004	No change from last entry.	96%	Green	
		8/9/2004	Exceed FY 04 goals but still monitoring awards until the end of the FY. This task will carry over into the next FY as we continue to monitor contract dollars awarded to small businesses.	96%	Green	
50	EPMS	<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>				
		8/18/2004	All IPC related business cases for 04 have been identified for project reporting purposes. Continue to work with PMs to have all projects reporting in.	85%	Green	
		8/3/2004	IPC updates via the PMO scorecard are scheduled to resume Wednesday, August 11, 2004. IPC records have been reviewed and we believe that all projects/initiatives have been contacted regarding reporting into the PMO. July reports are due by 8/5. PMO staff can then ensure that all projects are reporting in.	80%	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 Date</i>	<i>Comments</i>		
		8/3/2004	Per IPC meeting of July 28, this action item was approved to be cancelled.	08%	Cancelled
52	ADS		<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>		
		8/20/2004	The establishment of an integration team is necessary if FSA is to assume the integration support functions currently performed by our integration contractor, Grant Thornton. This new team was proposed in the ASEDS reorganization package which was only recently approved. After implementation of the reorganization, it will be necessary to hire staff and train the team to assume their new responsibilities. There is insufficient time available to fully accomplish this before 9/30/04. A new date for accomplishing this action item will be proposed after authority for hiring staff has been granted.	70%	Red
		8/6/2004	The establishment of an integration team is necessary if FSA is to assume the integration support functions currently performed by our integration contractor, Grant Thornton. This new team has been proposed in the ASEDS reorganization package which has yet to be approved. After implementation of the reorganization, it will be necessary to hire staff and train the team to assume their new responsibilities. There is insufficient time available to fully accomplish this before 9/30/04. A new date for accomplishing this action item will be proposed after the ASEDS reorganization has been approved and authority for hiring staff has been granted.	70%	Red
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>			
8/17/2004	General	GAO issued their draft report 8/18/04 and requests response by 8/31/04. The title of the report is "Better Strategic and Human Capital Planning Would Help Sustain Management Progress."	89%	Green
	Financial Management	FSA provided further information to GAO on the types of drivers used in our ABC model and made suggestions for improving GAO's definitions of resources and activities that GAO accepted.		
	Systems Integration	GAO had no further questions in this area during this reporting period. The draft report notes our progress to date but also that we have some way to go in our integration efforts.		
	Program Integrity	GAO requested the CAP on a review they did of DSLP customer service and the documentation that shows we completed the one recommendation from that review: that we survey schools that leave the program. The draft GAO report recommends that FSA issue clear guidance and detailed directions for CMO teams to follow when performing comprehensive compliance reviews.		
	PBO Management	GAO asked questions about the exact timing of events related to the ASEDS reorganization and FSA's request for early out/buy out authority in connection with that reorg and we provided the answers. The GAO draft report has 4 recommendations in this area: 1) develop 5-year performance plans with action steps that are linked to FSA's strategic objectives; include measures or trend data in FSA's performance reports that clearly demonstrate whether we have made progress toward achieving our strategic objectives; 2) revise our succession plan to include approaches that focus on current and future capacity and needs as well as provide developmental projects or training for staff to prepare them for new duties; 3) build systematic evaluation activities into human capital initiatives such as the Learning Coupon; and 4) establish and clearly communicate clear criteria for awarding bonuses to senior staff.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>	<i>%Complete</i>	
		<p>8/6/2004 General GAO's draft report on their high-risk review is due to us August 9 or 10, our comments will be due back August 23-25, and the final report will be issued September 10.</p> <p>Financial Management GAO requested FSA/CFO review a graphic they developed for their report on our cost model. Jay Hurt had commented on that in April, and resent those comments along with a proposed graphic that better depicts the resources, activities and outputs of FSA's model. GAO expressed appreciation for Jay's assistance.</p> <p>Systems Integration GAO requested FSA review a graphic they developed to depict our integration efforts. Katie Crowley reviewed it and sent GAO another graphic that depicts our systems integrations to date and planned. Mary Dorsey at GAO strongly expressed her appreciation for all the help Katie and others have given her as she struggled to learn our business and systems after joining the review in April.</p> <p>Program Integrity No questions from GAO in this area. We will probably have the opportunity to present some of CMO's recent efforts in our response to the draft report. We plan to keep GAO updated biweekly or monthly between now and December with good news in this area especially. We may want to brief GAO on our corrective action plan for the recommendations from OIG's review of CMO after that report is issued in final form.</p> <p>PBO Management GAO asked a follow up question on the Career Zone and Anne responded. They asked a question about the \$603m budget amount for fy2004 that was in the February presentation on reducing administrative costs that Mary Grace and Richard answered. They also asked again about the 2003 annual plan and senior managers' performance plans for that year. The 2003 plan we gave to GAO is the 18-item version (the 18 items that were funded) that was shared outside FSA. The senior managers' performance plans we gave to GAO had attached the 32-item version of the 2003 plan. Cyndi talked with Carolyn Taylor, Susan Higgins and Carla Craddock and explained the difference between the two plans.</p>		85%	Green
54	AWSS	<p><i>Deliver workforce development and support programs.</i></p> <p>8/20/2004 We notified the union 8/11/04 of our intent to begin implementation of the ASEDs reorganization.</p> <p>8/7/2004 None.</p>		90%	Yellow
56	CFO	<p><i>Review Credit Reform estimates.</i></p> <p>8/20/2004 Contracted technical experts submitted a draft narrative analysis of the credit reform accounts included in FSA's financial statements. The team met with credit reform personnel from Budget Service, and continued to develop documentation of ED's credit reform business processes. This documentation will form the basis for making FY05 recommendations for improvements. Over the next several weeks, the team will gather additional data as needed from program managers.</p>		71%	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>		
		8/6/2004	Budget Service, FSA, OCFO, and OPE presented the results of their FY04 collaborative efforts to auditors from Ernst & Young. Contracted technical experts met with representatives from each of the following groups of credit program managers in FSA: policy liaison and implementation; budgeting; loan origination; financial partners; direct loan servicing; loan consolidation; and, debt collection. The contractors began to draft an overview of ED's progress in addressing the credit reform reportable condition, and to make recommendations for FY05 improvements. Over the next several weeks, they will gather additional data as needed from program managers. We are confident that this project will be successfully completed by the end of the fiscal year.	59%	Green
58	CFO	<i>Support the implementation of Oracle Federal Financials Release 11i.</i>			
		8/20/2004	Submitted final set of FSA requirements for incorporation into ReqPro. Distributed draft credit reform reporting flows and started discussions regarding the flows and options. Continued discussions with FSA CIO staff regarding FFEL extension options. Framed discussion around control requirements. Attended a Real Application Clusters (RAC) demonstration conducted by Oracle Corporation and began participating in discussions regarding our choice of infrastructure architecture. Assisted implementation contractor by providing FSA FMS training materials.	83%	Green
		8/6/2004	<ul style="list-style-type: none"> · The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional sub-teams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users. · Prepared a draft FSA Schedule 9/TROR position paper and distributed for review · Assisted IBM in the identification and inventory of all FSA FMS customizations and extensions · Assisted IBM in the formulation of a project-wide Change Management (CM) policy and process 	78%	Green
59	CFO	<i>Implement automated budget funding entry solution.</i>			
		8/20/2004	FMS contractor are 90% complete with development and unit testing. The EDCAPS contractor continues system testing. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all develop code and test in unison. The project continues on-schedule and on-budget.	77%	Green
		8/6/2004	FMS contractors continue to develop the code; the EDCAPS contractor has delivered the FMSS build to their system testers. The FMS and EDCAPS contractors finalized their test scripts. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all develop code and test in unison. The project continues on-schedule and on-budget.	71%	Green
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>			
		8/20/2004	Migration of the new CSB consolidation functionality continues. The Data Mart (replaces CMDM and DLDM) is in parallel operations. Implementation is scheduled for October 1, 2004. The Siebel front-end is also undergoing "end to end" testing. Implementation is scheduled for October 8, 2004.	85%	Green
		8/10/2004	Migration of the new CSB consolidation functionality has begun. Data conversion is progressing well. All five development releases of Phase 1 are in test.	80%	Green
63	ADS	<i>Improve school partner oversight.</i>			
		8/6/2004	With the completion of milestones 63.1 and 63.6, this project is completed.	100	Completed

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
67	ADS		<i>Prepare to implement IRS data match.</i>		
		8/20/2004	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 was scheduled to make its presentation to the Council on 8/11/04, but the presentation had to be postponed. The Workgroup is waiting to hear when the meeting can be rescheduled.	78%	Green
		8/6/2004	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 is still scheduled to make its presentation to the Council on 8/11/04.	78%	Green
68	AWSS		<i>Continue Learning Coupon program.</i>		
		8/20/2004	461 staff have submitted coupons, which is 43.1% of FSA staff (1070) and 96% of our target of 45% of FSA staff. \$205,633 has been obligated, which is 91.4% of \$225,000 budgeted. Target was 90%. To date, there have been no instances of coupons being used for unauthorized purposes or of the employee account limit being exceeded.	99%	Green
		8/7/2004	None.	30%	Yellow
69	AWSS		<i>Provide Career Zone services.</i>		
		8/20/2004	The interest in the Strong Interest Inventory assessment continues to increase; over 20 staff members, both in the regions and at HQ, have taken the test this month, thus far. This assessment tool will be formally launched in September. The Lunch and Learn series continues to be very popular. Utilizing a different advertising method this month, the Brown Bag Book Club has an unprecedented 6 new employees, in addition to the regulars, registered for the next meeting 8/24/04. The book this month is FISH! for Life. We had 2 new attendees of the The Brown Bag Video Club, which showed an encore performance of Whale Done. Interesting note, we had a manager to borrow this month's video to show at their case team meetings in Chicago the week of August 9th. The Career Zone has visited Denver, Seattle and San Francisco the second week of August, and are visiting Kansas City and Dallas this week. We will visit Chicago and Atlanta in September.	95%	Green
			We are meeting or exceeding our Success Measurements and expect to complete the entire Project by the completion date.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		8/7/2004	The Career Zone began July by introducing its second session of Conversational Spanish Experience; this class was full within hours of opening. Also enthusiastically received was the Brown Bag Video Presentation of "Who Moved My Cheese", which showed a 150% increase in attendance. The Career Counselors have now engaged over 50 new clients utilizing career counseling with an approval rate of 4.5; 3 of the new clients are from the visits to the New York and Philadelphia Regional visits in July. In August, the Denver, Seattle, San Francisco, Kansas City and Dallas regional offices will receive a Career Zone visit. The Career Zone is now able to offer an online version of Strong Interest Inventory Assessment to staff both at HQ and in the Regions. There is a strong interest in the regions for this assessment tool, and although it has not been advertised in HQ yet, we have already had staff to take the assessment due to persistent interest. An official campaign will be launched in August. With Career Zone Training and Career Zone Career Management running neck in neck at 4.8 and Counseling at 4.5, the Career Zone's evaluations come in a exciting approval rating of 4.71 on a 5 point scale.	75%	Green
70	ADS	<i>Increase Student Financial Aid program awareness.</i>			
		8/20/2004	The two Milestones associated with this project (70.1 & 70.2) have been rolled into the Front End Business Integration (FEBI) small business initiative, now known as 'Federal Student Aid Integrated Enterprise Communications (FSAIEC)'. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. A request for quotes and an invitation to offerors has been sent to ten potential vendors. Past performance was received 8/2/04 and oral presentations are scheduled for 8/09/04 through 8/12/04. Task Order for Integrated Enterprise Communications Strategy and Implementation Plan was released 8/19/04. This effort combines the vision of FSA communications group and Student Aid Awareness. Responses to the Task Order request are due at 12:00pm on 9/7/04.	75%	Green
		8/6/2004	The two Milestones associated with this project (70.1 & 70.2) have been rolled into the Front End Business Integration (FEBI) small business initiative, now known as 'Federal Student Aid Integrated Enterprise Communications (FSAIEC)'. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. A request for quotes and an invitation to offerors has been sent to ten potential vendors. Past performance was received 8/2/04 and oral presentations are scheduled for 8/09/04 through 8/12/04. Task Order for Integrated Enterprise Communications Strategy and Implementation Plan to be released 8/16/04. This effort combines the vision of FSA communications group and Student Aid Awareness.	70%	Green
71	ADS	<i>Reengineer EDEExpress.</i>			
		8/20/2004	The final task for Reengineering EDEExpress will be to test and post the Return to Title IV on the Web. FSA Acceptance Testing is occurring during this week and is approximately 75% complete. The System of Records Notice (SORN) was posted in the Federal Register on July 23rd with a for a forty-day comment period. The anticipated completion of the clearance process is by late August. The PRR is scheduled for September 8th.	98%	Yellow
		8/6/2004	The final task for Reengineering EDEExpress will be to test and post the Return to Title IV on the Web software.FSA Acceptance Testing is scheduled for the week of August 16th. The System of Records Notice (SORN) was posted in the Federal Register on July 23rd with a forty-day comment period. The anticipated completion of the clearance process is by late August. The PRR is tentatively planned for early September.	95%	Yellow
73	CIO	<i>Develop FSA Security and Privacy Architecture Pilot.</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>		
		8/20/2004	Participated in the pre-kickoff meeting of the enrollment and access management team, which is going to address enrollment and access for FSA enterprise-wide. Expecting a response to the SOO from the LSC partner.	100	Completed
		8/13/2004	Had discussions with ILSC team on the expected outcomes for the conceptual design. Expecting a response to the SOO this week.	100	Completed
		8/6/2004	Completed the Independent Govt Cost estimate and communicated it to the contracts. Currently in discussion with ILSC team about the scope of work for the Conceptual design SOO.	100	Completed
		7/30/2004	Completed the final SOO for Security Architecture Conceptual Design and have communicated it to ILSC. Awaiting a response from ILSC. Participating in discussions regarding IPM and Security Architecture Dependencies.	100	Completed
74	AWSS		<i>Implement Leadership Excellence development training.</i>		
		8/20/2004	No Change.	75%	Yellow
		8/7/2004	FSA is in the process of updating a Human Capital Plan that will focus on several areas, including leadership development. We will defer the adoption of a 360 assessment tool until FSA is further along with its leadership development curriculum and can determine how to integrate this kind of tool.	75%	Yellow

FSA Milestone Status Report

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
1	ADS	Implement student aid awareness initiatives.						
			1.1	Leverage partnership activities to disseminate FSA information.				
					8/20/2004	During this reporting period, SAA participated in 5 continuing partnership activities - August 4-6, collaborated with Atlanta regional staff to provide training to TRIO staff in Puerto Rico. August 5, participated in early awareness panel as part of the Bureau of Indian Affairs Office of Indian Education Program conference (BIA-OIEP) for Native American students, parents, and administrators. Brochures and flyers were distributed to attendees. August 6, presentation on FSA Web products (FAFSA, Student Aid on the Web, and the Counselors Web Site) and distribution of financial aid materials to LULAC (League of Latin American Citizens) TRIO counselors. August 9, FSA Braille and print publications (FAFSA, Student Guide, Funding Your Education and Repaying Your Student Loans) provided to the Texas Commission for the Blind in Austin, TX to support a workshop for students coordinated by state vocational rehabilitation counselors. August 14, provided financial aid materials for the American Indian Society POW WOW in Mt. Jackson, VA.	100%	Complete
					8/6/2004	SAA participated in 4 continuing partnership activities - July 21-24 collaborated with the White House Initiative on HBCUs to exhibit financial aid materials at the National Urban League Conference in Detroit, MI. July 25 – 28 distributed college preparation and financial aid information as well as a fact sheet describing how schools and school districts can join FSA's mailing list and order print publications at the National Indian School Board Association (NISBA) conference - participants included school board members, teachers, counselors, and administrative staff from Bureau of Indian Affairs schools and other schools with a high concentration of Native students. On July 28, presented a financial aid workshop to members of the GEAR-UP and college access community at the 2004 National Council for Community and Education Partnerships (NCCEP) annual conference in Washington, DC. July 28 participated in the U.S. Department of Labor's Youth Career Skills Challenge held at Catholic University in Washington, DC. - conducted three workshops on financial aid and exhibited materials during the college and career fair.	100%	Green
			1.2	Publish accurate and timely information that meets the needs of our audience.				
					8/20/2004	Designs for Guide cover from GPO designer will have to be revised based on more information from usability study re participants wanting an "official-looking" publication. Based on further discussion with GPO, a new designer has been selected who will come up with three design choices. Work on draft Guide nearing completion. Completing the FAFSA will go out for review on August 23rd. Usability study results will be incorporated this week for the Audio Guide. The Counselor's Handbook draft is being reviewed, and the text should go to the designer for layout this week.	35 %	Green
					8/6/2004	GPO designer has provided two design choices for the Student Guide - program manager is pursuing a third choice. Designs may need revisions. Text of Guide still being revised. Usability study feedback reports show that student prefer an 'official' looking cover for FSA's information materials - which supports the credibility of the content. Usability study feedback is being incorporated into 2005-06 materials as development calendar permits. Draft of Counselor's Handbook completed. Work on Completing the FAFSA has begun.	19 %	Green

1.3 Disseminate information directly to target audience.

8/20/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 8/18/04, SAA has provided federal student aid information and distributed materials to approximately 81,334 persons. During this reporting period information and materials were distributed as follows: 83 % Green

August 4-6, 2004	SAEPOO	60
August 5, 2004	BIA Denver	22
August 6, 2004	LULAC TRIO Training	35
August 9, 2004	Texas Commission for the Blind	200
August 14, 2004	American Indian POW WOW	100

Addition to previous reporting period - In July 2004, 228 individuals received information and materials as part of Usability Focus Groups. 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.

8/6/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 8/4/04, SAA has provided federal student aid information and distributed materials to approximately 80,689 persons as follows: 80 % Green

July 24-29, 2004	National Indian School Board	200
July 25-28, 2004	NCCEP/GEAR-UP	60
July 28, 2004	DOL Youth Career Skills Challenge	150

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.

1.4 Respond accurately and timely to requests.

8/20/2004 For the period 8/2/04 –8/13/04, the Editorial Services Contract responded to the following correspondence: 99 % Green

	This Period	Prior period	YTD	Turnaround Time
Controls	86	104	1,962	100%
Non-Controls	1,40	1,205	51,716	99%
E-mails	2,295	2,376	43,933	100%

8/6/2004 For the period 7/5/04 –7/16/04, the Editorial Services Contract responded to the following correspondence: 99 % Green

104 controls--- (97 prior period)-----turnaround (3 days)=100%
 1205 non-controls--- (1117 prior period) —turnaround (2 days)=100%
 2376 e-mails--- (2008 prior period)-----turnaround (2 days)=100%

1.5 Reach customers through Student Aid on the Web.

8/20/2004	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 (08-01- to 08-14-04) are 865,686 and 15,823,019 respectively. During the same period last fiscal year we had 653,755 visits and 10,338,369 hits. This represents FY04 increases of 32.4% for visits and 53% 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 44,964 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
8/6/2004	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 (07-18- to 07-31-04) are 856,715 and 16,252,118 respectively. During the same period last fiscal year we had 658,259 visits and 10,540,949 hits. This represents FY04 increases of 30.1% for visits and 54.2% 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 42,954 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.

8/20/2004	<p>Progress continues as follows:</p> <p>EZ Audit -- We are updating our phone script for the EZ Audit text as a result of our past experience with the current script. We anticipate that there will be less confusion as we try to route certain calls to specific customer service representatives. There may be no further activity for this item for the remainder of the fiscal year.</p> <p>Subscription -- We continue to enroll new users to our Subscription service. Our report in September will reflect the end of August volume of subscribers.</p> <p>Customer Feedback -- We have not received any new requests or suggestions for changes to our systems, and all previous requests have been forwarded to FSA staff.</p> <p>Replace Current IFAP Search Engine with Google -- This is an on-going project managed by FSA's OCIO. The current expectation is that the new hardware and software will be available by August 29, 2004 to our web maintenance contractor (Indus). They in turn are expected to complete their part of the implementation by September 20, 2004. We were originally expecting this to be completed in FY 05 (and there is still a chance that that may happen). But it is fairly certain that the new search engine will be fully operational before the EACs in November and December.</p>	95 %	Green
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<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					8/6/2004	Progress continues as follows: Replacement of IFAP and School Portal Search Engine -- Google servers arrived this week, so they are approximately on schedule. ITA plans to migrate FSANet first, then IFAP, which might happen in September. It's possible this new hardware and software may not be totally transitioned until the next fiscal year, but certainly by the end of the 2004 calendar year.	85 %	Green
8	ADS	<i>Expand eZAudit initiative.</i>						
		8.1	Be Prepared for Contract Award.					
					8/20/2004	The recomplete for this contract (including the merging of the DRCC and the eZaudit functions) is in the due diligence phase (answering questions from vendors and conducting interviews). This phase will be complete 9-10-04. Proposals will be due from vendors on Sept 8.	85 %	Green
					8/6/2004	Task order awarded July 30.	80 %	Green
		8.2	Complete first full cycle of processing (all school types).					
					8/20/2004	As of 8-16, 4,681 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed the milestone, but will continue to report on volume of submissions rec'ed through the end of the year.	100%	Complete
					8/6/2004	As of 8-1, 4,502 annual audit submissions have been rec'd. We have processed all school types, including public, private non-profit, proprietary, nursing schools, and foreign schools. We have completed the milestone, but will continue to report on volume of submissions rec'ed through the end of the year.	85 %	Green
		8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.					
					8/20/2004	As of 8-15-04, 4,598 schools have registered.	92 %	Green
					8/6/2004	As of 8-1-04, 4,495 schools have registered, 90% of all schools.	90 %	Green
9	ADS	<i>Enhance program monitoring and oversight.</i>						
		9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year.					

8/20/2004 For the biweekly period 8-2-04 to 8-15-04, 74% of the audits were resolved on time. Cumulative since 10-01-03, 93% of the audits were resolved on time. We processed more paper audits, and these are causing the decline in the percentages. FSA still is receiving some audits in paper and we are working with schools to get all schools to submit their audits through eZ-Audit as the current regulation requires. We are continuing to monitor this closely. There are 10 audits on administrative stay. The IPD (Institute for Professional Development) Schools have signed a settlement agreement and paid \$4,442,076.

The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 10 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one quarter of 1 percent.

8/6/2004 For the biweekly period 7-19-04 to 8-1-04, 99% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.

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

8/20/2004 We briefed OPE on 8-16 on the FY 2004 Compliance Initiative. They are reviewing the training materials.

Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 50%. Schools & locations without required profiles is down from 2,356 on 3/17/2004 to only 1,114 on 8/13/2004.

8/6/2004 The dry run training for the FY 2004 Compliance Initiative was conducted on 7-27 & 28. SEC briefed Management Council on 8-2-04. Next steps include briefing OPE and OGC on 8-12.

9.3 Conduct School Relations initiatives.

8/20/2004 The School Relations Branch has developed a data base that lists all the HBCUs with the Perkins Cohort Default Rate, and the dollar amounts in default for two years as well as for those in default more than five years. We will be meeting with Campus Based Operations to discuss options.

8/6/2004 Data is being studied by Campus Based Operations for the HBCU Perkins default project. We will explore a course of action based on this analysis.

9.4 Conduct the Experimental Sites initiative.

8/20/2004 Work continues, but no significant change in status of the analysis report. FSA staff are completing the appendices to the draft report. We have concluded the planning meetings and action plan for delivering the next version of the on-line reporting templates for academic year 2003-04 by September 30, 2004.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					8/6/2004	Work continues, but no significant change in status. CIO has agreed to fund the updates to the reporting mechanism for the next cycle of data submission and analysis and preliminary discussions have taken place, to be followed by planning meetings.	90 %	Green
			9.5	Administer the Quality Assurance program.				
					8/24/2004	Work continues to provide QA schools with training sessions on Phase I of the ISIR Analysis Tool via WebEx technology. We conducted 17 sessions as of August 20, with 2 make-up sessions scheduled before the end of August 2004. We have added 3 other WebEx sessions in August to introduce the Tool to FSA external trainers who will deliver the "R2T4, Analyzing Data, and Conflicting Information" Training to schools starting in September 2004. The FSA Assessments are also included in this training series.	96 %	Green
					8/6/2004	In addition to providing Guidelines for using Phase I of the ISIR Analysis Tool, training sessions using WebEx technology began the week of July 26, 2004. We conducted 11 as of August 4, with 6 more scheduled between August 6 – 13, 2004. We completed the review and made the enhancements to all 22 FSA Assessment modules.	95 %	Green
			9.6	Conduct vulnerability assessment.				
					8/20/2004	Data gathering interviews and research concluded this reporting period, and work began on an outline for the report and action plan. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.	65 %	Green
					8/6/2004	Work this reporting period included a status briefing to the ASEDs management council and additional interviews and working meetings with subject matter experts. Work to identify vulnerabilities and potential mitigation strategies associated with student identification and authentication continues. Work is on track to complete the assessment and action plan by the September 30, 2004 due date.	50 %	Green
10	ADS	<i>Produce school publications and materials.</i>						
			10.1	Annually update and disseminate the Federal Student Aid Handbook.				
					8/20/2004	Project turned green after a date change. The project is still in the review process currently.	70 %	Green
					8/6/2004	Completion date for FSA Handbook Revised date: September 30, 2004 This year we revised the Handbook to be more meaningful to our schools. This shifted information and so it is taking more time than usual to go through the review process. The review of several volumes of the FSA Handbook is still underway, and has already taken much longer than for previous versions of the FSA Handbook. Volumes 3 and 4 of the Handbook were circulated for review in early February and early March, respectively. However, a new review process is now in place, and we are waiting for the Office of Postsecondary Education to provide comments.	70 %	Red

<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>
			10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.				
					8/20/2004	The PLUS Basics brochure has been approved by OPA and is now beginning the print process. Expected delivery to the EDS Warehouse is late September 2004. The students brochure is out to a professional proofreader (an FSA requirement to be fulfilled before sending the document to OPA). Once those edits are made, it will be sent to OPA for review and approval. We hope to get this brochure printed before the end of the fiscal year as well. Currently, there are 81 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 (with a small amount for the student brochure). As previously noted, schools have been informed that we are revising these brochures.	89 %	Green
					8/6/2004	The PLUS Basics brochure is being reviewed by OPA. The students brochure is out for review and comment. Currently, there are 73 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 (with a small amount for the student brochure). As previously noted, schools have been informed that we are revising these brochures.	85 %	Green
13	BS	Enhance program monitoring and oversight.						
			13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.				
					8/23/2004	Total non-consolidation recoveries have now reached \$1.38 billion and increase of 23 percent over the same period, August 6 in 2003. This figure represents 8.67 percent of the FY04 portfolio balance.	93 %	Green
					8/10/2004	Total non-consolidation recoveries have now reached \$1.361 Billion, an increase of 24 percent from the same period, thru July 30th, in FY03. This represents 8.55 per cent of the FY04 portfolio balance.	90 %	Green
			13.2	Update FSA-wide risk management and default prevention inventory.				
					8/20/2004	Nothing new to report.	95 %	Green
					8/10/2004	The Default Prevention Workgroup met on July 30 and reached agreement on strategies, strategy owners, and the tracking of initiatives. A new strategy for Fraud Prevention was established and will include verification processes for FASFA and Conditional Disability claims. A notebook was created on a shared drive to permit strategies and action steps to be updated as needed and to provide an electronic notebook for outside entities (i.e. GAO) to review FSA efforts to reduce the high-risk status.	95 %	Green
			13.3	Complete the work on the implementation of the life-time default rate measure.				
					8/20/2004	Nothing new to report	90 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		<i>Milestone# Action Item</i>				
			8/10/2004	The Portfolio Risk Management Group has extracted data from the NSLDS for FFEL loans for cohort years 1994-1998. The information is being placed in review format.	90 %	Green
		13.4 Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.				
			8/20/2004	The goal to increase the cure rate on 180 days plus delinquent loans by 1 percent over FY2003 was achieved in April 2004. The goal for FY2004 is 55.1 percent. The actual rate for July 2004 was 60 percent.	90 %	Green
			8/10/2004	The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-August.	80 %	Green
		13.5 Conduct vulnerability assessment.				
			8/20/2004	The vulnerability assessment is complete. The results from the vulnerability assessment will be used in FY2005 to assist with testing and security issues relevant to CSB development and implementation.	100%	Complete
			8/10/2004	The Independent Verification and Validation (IV&V) team has delivered the plan for review of the CSB project. The major areas that will be reviewed and monitored are Requirement Management Process, Risk Management, Change Management, Test Process, Security Risk Assessment and Certification and Accreditation Support, Review Financial Controls, Production Readiness Review recommendations, and Maintainability Assessments. Each of these areas will be reported on the FY05 performance plan.	100%	Green
16	FPS	Perform National Student Loan Data System (NSLDS) maintenance and operations activities.				
		16.1 Perform cohort default rate calculations, send, and post.				
			8/20/2004	The QA/QC process is still in progress. A meeting was held to review the rates with FSA staff and the public affairs office. Internal filese between PEPS and NSLDS have been exchanged successfully. Rates will be electronically sent on Monday, 9.13.2004.	85 %	Green
			8/6/2004	The official cohort default rate calculation ran successfully on Saturday, 7.31.2004. Data files were transferred to PEPS. QA/QC review is now is process. NSLDS will send Cohort Default Rate packages electronically to schools via SAIG on Monday, 9.13.2004.	80 %	Green
		16.2 Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.				
			8/20/2004	The LPIF calculation ran successfully. The file was sent to FMS for payment and the back-up tapes were mailed to the Guaranty Agencies. This is the final calculation that will occur in this fiscal year. The next calculation will take place Monday, 11.15.2004.	100%	Green

8/6/2004 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.

8/20/2004 The July Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month rose slightly 98.90%. 80 % Green

8/6/2004 The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%. 76 % Green

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

8/20/2004 Detail design document completed and due to FSA on Monday, 8.23.2004. Determined items for comparison for lender reasonability study, will be meeting with CFO office on Wednesday, 8.25.2004. Started research on comparison items with queries. 80 % Green

8/6/2004 Final detail design requirements have been approved by the department. Programming for GA monthly reasonability has begun. Lender analysis crosswalk has been drafted. 70 % Green

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.

8/20/2004 The Data Mart team is testing the Consolidation Loan Fee Payment Analysis Report. Testing will be completed the week of August 16. 95 % Green

8/6/2004 The team completed the analysis of the current reports - all reports are valid at this time. 94 % Green

19.2 Quarterly evaluation of use and value added to the guaranty agency and lender review processes.

8/20/2004 All reported Guaranty agency issues have been tested and deployed. This item is now closed as of Thursday, 8.12.2004. 100% Green

8/6/2004 The deficiency code record has been loaded to the FP Data Mart. Monthly Report submitted. 92 % Green

19.3 Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.

<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>
					8/20/2004	No data load was extracted during this reporting period. Next extract will occur the week of August 30.	91 %	Green
					8/6/2004	No Changes to this activity this reporting Period.	91 %	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>						
		20.1	Monitor and evaluate web page hits to drive future postings to portal.					
			8/20/2004	The FP Instructional Manuel links has been deployed on each page of the Portal under FSA links. Font irregularities on the Publication page were corrected and deployed.			99 %	Green
			8/6/2004	The Guaranty Agency Financial Report ED FORM 2000 Interim Instruction Guide was posted. Monthly report submitted.			98 %	Green
		20.2	Maintain current and relevant information to financial partners' user community.					
			8/20/2004	The Team deleted several items from the Interest Rate page and the What's new page.			98 %	Green
			8/6/2004	The What's New template was deployed on Sunday, 8.1.2004. Monthly Report submitted.			96 %	Green
		20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.					
			8/6/2004	Completed.			100%	Complete
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>						
		22.2	Prepare performance measure assessment and benchmarking reports.					
			8/20/2004	Draft report will be published Monday, 9.6.2004.			97 %	Green
			8/6/2004	Progress on this milestone has been impacted by the additional data requests from Ernst & Young in support of maintaining our clean audit opinion. Working to address the impacts so that a test report can be published by 9.5.2004.			96 %	Green
		22.3	Evaluate new applications for VFA.					

Status Date	Comments	%Complete	Status
8/20/2004	Completed.	100%	Complete
8/6/2004	Benchmark process is complete and the report will be published beginning 10.1.2004 using the results from Colorado and the in process applications for Missouri, USAF, and Nebraska/South Dakota.	100%	Green
22.4 Foster effective working relations with guaranty agencies during scheduled site visits.			
8/20/2004	Continued to work with NSLP/EAC and USAF regarding cost neutrality of their proposed VFAs. Held conference call with ECMC regarding steps necessary to submit a VFA proposal including an explanation of the costing model. Currently in the process of coordinating attendance at the October VFA Information sharing session for V. Bateman and M. Sutphin. Also coordinating visit and meeting by EdFund with V. Bateman, T. Shaw and S. Stroup to discuss re-negotiation of existing VFA agreement.	88 %	Green
8/6/2004	Out-reach efforts to continue development of effective working relationships for this period included conference call with CSAC/EdFund Executive Management to discuss ways to modify the existing VFA agreement to bring it back into cost neutrality, continued negotiations with NSLP/EAC regarding their VFA proposal, and discussions with USAF to explain the need for stability in the SLMA Guarantor Servicing system before VFA approval.	86 %	Green

25 FPS Enhance program monitoring and oversight.

25.1 Participate and provide Financial Partners Channel support for ED audit.			
8/20/2004	Due to an additional E&Y sample of Federal Receivables, the GAs have been asked to provide explanations for those sampled aged loans. Fourteen of the fifteen GAs have provided Trial Balances based on data from their financial records. E&Y is also in the process of analyzing a select group of GAs Federal Fund balances. FP will continue to coordinate and monitor E&Y's requests.	88 %	Green
8/6/2004	An additional request has been made of fifteen GAs to provide Trial Balances from their financial records. Financial Partners has received the additional three months (April through June 2004) of subrogated and Federal Receivables from the five GAs. Reconciliations have been completed by the Accounting Division between DCMS and Form 2000 download subrogations for the five GAs. FP will continue to coordinate and monitor E&Y's requests.	86 %	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.			
8/20/2004	During this reporting period completed two-week reviews of the Iowa and New Hampshire guaranty agencies. Completed the first week of two-week reviews at the Tennessee and North Carolina guaranty agencies.	85 %	Green
8/6/2004	During this reporting period the review teams completed the first week of a two-week review of the Iowa and New Hampshire guaranty agencies. A revised Compilation of Servicer Review Findings and Observations was issued. Copy submitted.	83 %	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>
			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.	8/6/2004	Completed.	100%	Complete
			25.4	Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.	8/6/2004	Completed.	100%	Complete
			25.6	Conduct vulnerability assessment.	8/20/2004	Draft of the NIST vulnerability matrix is due to be delivered by close-of-business Friday, 8.20.2004. FSA review will begin on Monday, 8.23.2004. Began determining how the final study will be reported. While this action item did commence with a late start date, we are confident this effort will be completed no later than Thursday, 9.30.2004.	65 %	Green
					8/6/2004	Work continues on this project. Contractor is following NIST procedures and completing NIST survey. NOTE: This milestone did not commence until Monday, 6.28.2004. Work is currently at midpoint and continues to be on track for completion no later than Thursday, 9.30.2004.	50 %	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>						
			47.2	Incorporation of FEBI into process by September 30, 2004.	8/25/2004	The IPC agreeded to remove this milestone requirement.	90 %	Cancelled
					8/20/2004	No change from last entry.	90 %	Green
					8/9/2004	The FEBI contract will not be awarded until 30 September 2004 or beyond. Consequently, it will not be possible to implement standard contract performance management for this program in FY04. The Target Date for this milestone must be changed to September 2005.	90 %	Green
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>						
			48.2	Establish reporting process to monitor vendor performance.	8/20/2004	No change from last entry.	85 %	Green

8/9/2004 The process improvement will continue through FY05. 85 % Green
 The strategic acquisition planning and contract analysis tool (SAPCAP) database will include data fields for entering data related to vendor performance. The revised COR designation letter under development, combined with the ongoing COR training and certification evaluation, followed by implementing a program to train, re-train, certify or re-certify COR's will enhance FSA's methodology and processes for monitoring vendor performance monitoring.

54 AWSS Deliver workforce development and support programs.

54.1 Continue Intern Program.

8/20/2004 I've been closing out the summer program by collecting ID's and getting the remaining interns situated for the Fall. I've started putting my report together for this program with the survey results from the interns. I was off all of last week on vacation. 98 % Green

8/7/2004 The interns are leaving this Friday. We had our intern fair on Monday the 2nd and it was a huge success. I'm still gathering the survey results from them. I've heard nothing but wonderful things from the managers about our interns and their work. We're very fortunate to have this group in FSA. 96 % Green

54.2 Conduct FSA Orientation.

8/20/2004 The "Dry Run" for the FSA New Employee Orientation Program (NEOP) was conducted on August 18, 2004. The new FSA NEOP website is scheduled to be demonstrated on August 23, 2004. 90 % Green

8/7/2004 The next FSA New Employee Orientation Program (NEOP) is scheduled for September 1, 2004. All new employees and employees that were scheduled for prior sessions, but were unable to attend have been notified to attend this session. All supervisors for these employees have been notified. The "Dry Run " for the presenters for the FSA NEOP is scheduled for August 18, 2004. 90 % Green

54.3 Implement results of One-ED Competitions.

8/20/2004 None. 25 % Yellow

8/7/2004 None. 25 % Yellow

54.4 Update Skills Catalog/Learning Tracks.

8/20/2004 FSA internal staff is reviewing the FSA Skills Catalog and is it tentatively scheduled to go to the proofreaders next week. 96 % Green

8/7/2004 Additional proofreading/refining is currently ongoing and being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit. A meeting is being held on August 11 for a final internal review and it is planned that the draft will be sent to external proofreaders the week of August 16. 94 % Green

54.5 Implement Workforce Alignment Strategy.

8/20/2004 None. 94 % Yellow

8/7/2004 None. 94 % Yellow

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

8/20/2004 This project has been reported as completed. 100% Complete

8/7/2004 The Management Council is conducting a retreat August 4-6 to focus on the updated FSA Human Capital Plan. Among the issues to be discussed are the creation of an FSA Human Capital calendar; items to include on a dashboard of Human Capital metrics; and an FSA approach to succession planning. 85 % Green

61 CIO Implement Enterprise Data Strategy initiatives.

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.

8/20/2004 Documented and distributed results from working sessions related to Campus-Based, NSLDS, and AR functional gap areas for deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis Final. 74 % Yellow

8/13/2004 Conducted working sessions during the week of August 9th for the Campus-Based, NSLDS, and AR functional gap areas for deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis Final. 71 % Yellow

8/6/2004 Conducted working sessions during the week of July 26th for the Campus-Based, NSLDS, FP and Case Oversight, and AR functional gap areas for deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis Final. 69 % Yellow

7/30/2004 Held kickoff/working group meetings during the week of July 21st for Campus-Based, FP Oversight, and NSLDS functional gap areas. 66 % Green

61.9 Develop the detail Data Quality Execution Plan.

Milestone# Action Item

Status Date Comments %Complete Status

8/20/2004	No Change.	74 %	Yellow
8/13/2004	Held a Data Quality Steering Committee meeting on Thursday, August 5th, to discuss data management.	71 %	Yellow
8/6/2004	Held a Data Quality Steering Committee meeting on Thursday, July 29th, to conduct a further analysis on data quality issues using the Assessment business templates.	69 %	Yellow
7/30/2004	Held a Data Quality Steering Committee meeting on Thursday, July 22nd, to conduct an analysis on data quality issues using the Assessment business templates.	66 %	Green

61.10 Develop a holistic XML Management Plan.

8/20/2004	Submitted deliverable 152.1.9a XML Registry/Repository Production Quarterly Report I to FSA on Friday, August 13th.	70 %	Yellow
8/13/2004	No Change.	67 %	Yellow
8/6/2004	Deliverable 152.1.9a XML Registry/Repository Production Quarterly Report I is on schedule for delivery on Friday, August 13th.	64 %	Yellow
7/30/2004	Continued supporting the XML Registry/Repository in production.	61 %	Green

61.11 Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.

8/20/2004	In the next couple of months: 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	85 %	Green
8/6/2004	In the next couple of months: 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.	80 %	Green

62 BS Begin the implementation of Common Services for Borrowers (CSB).

62.2 Begin implementing Phase 1 of the FSA-approved transition plan.

<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>
					8/20/2004	<p>Contracts - CSB continues to provide savings from 1) lower deliverable pricing and 2) reductions in the number of borrowers by identifying and resolving small balance accounts and closing those accounts.</p> <p>Development - The CSB data mart component of Phase 1 implementation is scheduled for Oct 1. The conversion of DL Servicing and all Loan Consolidation data is progressing well. The porting of the DLSS to HP Unix and development of the Common Data Repository are also progressing well. Reengineering loan consolidation and the Seible upgrade is underway with challenges for full implementation. All of these Releases are in various stages of testing. The schedule is being monitored closely. Phase 2 development activities are just beginning with initial Joint Applications Development (JAD) meetings being scheduled.</p> <p>Infrastructure - All but one data communications circuits and routers have been installed. A circuit into Iowa City is delayed due to a lack of telephone wires into the building. A tentative date for completion is August 27.</p> <p>Operations - Efforts continue to eliminate "negative balance" and "small balance" DCS accounts.</p>	85 %	Green
					8/10/2004	Migration of the new CSB consolidation functionality has begun. Data conversion is progressing well. All five of the development releases of Phase 1 are in test.	85 %	Green
63	ADS	<i>Improve school partner oversight.</i>						
			63.1	Procure a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).				
					8/6/2004	As reflected under milestone 63.6, the contract was awarded to ILSC (Grant Thornton) on 7/23/2004. Milestone completed.	100%	Complete
			63.6	Select competitively a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).				
					8/6/2004	The contract was awarded to ILSC (Grant Thornton) on 7/23/2004. Milestone completed.	100%	Complete
70	ADS	<i>Increase Student Financial Aid program awareness.</i>						
			70.1	Expand federal student aid awareness and outreach program.				
					8/6/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	100%	Complete
			70.2	Develop and implement long-term mass marketing strategy.				
					8/20/2004	Procurement on schedule. Task Order released 8/19. Due diligence to be conducted 8/24 – 9/26. Responses to the Task Order due 12:00pm on Tuesday 8/19.	75 %	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>		
				8/6/2004	Procurement on schedule. Oral presentations due week of 8/9/04. Task Order to be release 8/16/04.	70 %	Green
71	ADS	Reengineer EExpress.					
		71.3	Implement Return to Title IV Web Release.				
				8/20/2004	FSA Acceptance Testing is being conducted this week. A testing team has been put together and the PRR is scheduled for September 8th. The System of Records Notice (SORN) has been published in the Federal Register on July 23, 2004 and the 40-day comment period has begun.	96 %	Yellow
				8/6/2004	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. A testing team has been put together and the PRR is tentatively scheduled for early September.	95 %	Yellow
					The System of Records Notice (SORN) has been published in the Federal Register on July 23, 2004 and the 40-day comment period has begun.		