

SUMMARY

COMPLETED PROJECTS

- Acquisitions and Contract Performance staff have received acquisition training in several areas including acquisition planning, contracting, monitoring and business process analysis, among other areas. This training increased job knowledge and skills while improving overall performance. Project 46 (*Develop acquisition workforce*)
- Internal controls for procurement, including a reduction in the number of sole source contract awards and extensions, have been improved and continuous monitoring will continue. This completes Project 48 (*Continuously update and monitor procurement internal controls*).
- All of the major FSA projects are incorporated into PMO oversight. This includes monthly project reporting as well as updates to the IPC. Project 50 (*Continue to implement integrated project management oversight for FSA's system integration activities*).
- The Career Zone has served 108 new FSA clients in the fiscal year, surpassing the goal of 75 new clients by 44%. This number is expected to rise even higher when the final results of August and September are calculated. This completes Project 69 (*Provide Career Zone services*)

GREEN LIGHT

- The GovLoans team continues to prepare for the transfer of GovLoans ownership to the Department of Labor (DOL)/GovBenefits on September 30, 2004. Staff is working with OMB and DOL to finalize a Memorandum of Agreement that will be signed by Bill Leidinger (ED) and DOL. This contributes to the success of Project 37 (*Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives*).
- On September 2, 2004, FSA delivered the response to the GAO draft report titled, "Better Strategic and Human Capital Planning Would Help Sustain Management Progress." The response focuses on the significant accomplishments achieved by the organization during the past two years and includes a detailed human capital implementation plan. Project 53 (*Prepare and continually monitor and report on the accomplishments of the High Risk Plan*)
- 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 will conduct the briefing on September 8, 2004. Project 67 (*Prepare to implement IRS data match*)

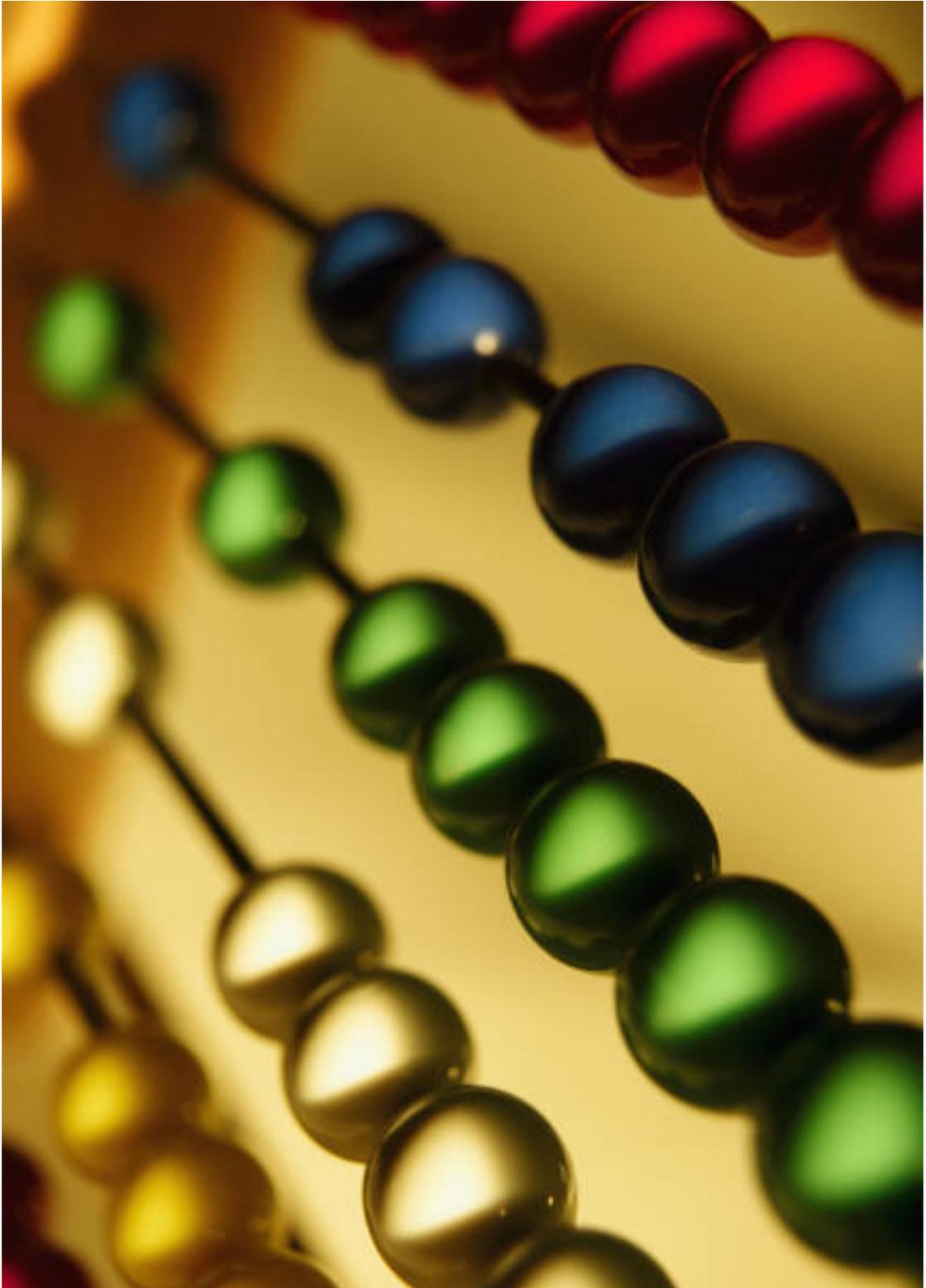
YELLOW LIGHT

- For this reporting period, 89% of audits were resolved on time. The cumulative fiscal year-to-date rate for audit resolution is 87%. More paper audits are being processed, causing the decline in percentages. Project 9, Milestone 1 (*ADS – Meet or exceed audit resolution rate of 95% by the end of the fiscal year*).

RED LIGHT

- Project 52 (*Restructure integration leadership support to transition the majority of responsibility to FSA staff*) continues to be 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.

Bi-Weekly Report as of September 3, 2004



FSA Performance Plan – FY2004

ACTION PLAN STATUS AT A GLANCE

as of September 3, 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 September 3, 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	✓
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	✓
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 September 3, 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	G
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	NR
40	POLICY LIAISON PLACEHOLDER	NR
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	✓
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	✓
48.1	Establish monitoring and reporting process for government furnished property	✓
48.2	Establish reporting process to monitor vendor performance	✓
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	✓
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	✓
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	cancelled

ACTION PLAN STATUS AT A GLANCE

as of September 3, 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 September 3, 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	✓
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	G

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>%Complete</i>	<i>Status</i>	
		<i>Status Date</i>	<i>Comments</i>			
1	ADS	<i>Implement student aid awareness initiatives.</i>				
		9/3/2004	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.	70%	Green	
		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	
2	ADS	<i>Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).</i>				
		9/2/2004	Currently waiting for August IFAP subscription data to evaluate progress. Nothing significant to report on other initiatives at this time.	95%	Green	
		8/20/2004	See milestone for progress report.	95%	Green	
			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.			
8	ADS	<i>Expand eZAudit initiative.</i>				
		9/3/2004	Proposals are due from vendors on Sept 8.	93%	Green	
		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 9-27-04. Proposals will be due from vendors on Sept 8.	92%	Green	
			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.			
			Over 90% of all schools have registered.			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i> <i>Comments</i>		
9	ADS	Enhance program monitoring and oversight.		
		<p>9/3/2004 Milestone 1</p> <p>For the biweekly period 8-16-04 to 8-29-04, 89% of the audits were resolved on time. Cumulative since 10-01-03, 87% 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 9 audits on administrative stay.</p> <p>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 9 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one quarter of 1 percent.</p> <p>Milestone 2</p> <p>A simplified NSLDS transfer student monitoring option for schools with additional locations was implemented 8-18. Schools do not have to register each location, as long as they report all students under the main OPEID. Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles. There are 630 main locations that do not have a profile as of 8/23/2004. The Administrative Actions & Appeals Division has received 137 referrals (67 for IPEDS violations) for administrative action and initiated 13 debarments from 10-01-03 through 9-01-04.</p> <p>Milestone 3: Webex initiative has continued throughout the regions offering training in Pell and Direct Loans. USR Database has been implemented to include Tribal, H SI, and HBCU schools.</p> <p>Milestone 4: FSA staff are completing the appendices to the draft report.</p> <p>Milestone 5: Has been completed.</p> <p>Milestone 6: Work has begun on developing the report and action plan. The project is on track to complete the assessment and action plan by the September 30, 2004 due date.</p>	89%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>%Complete</i>	<i>Status</i>
<i>Status</i>	<i>Date</i>	<i>Comments</i>		
	8/20/2004	<p>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.</p> <p>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.</p> <p>Milestone 2 We briefed OPE on 8-16 on the FY 2004 Compliance Initiative. They are reviewing the training materials.</p> <p>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.</p> <p>Milestone 3: Work Continues on the HBCU Perkins default list with meetings with the Campus based workgroup.</p> <p>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.</p> <p>Milestone 5: conducted 17 ISIR Analysis Tool sessions as of August 20, with 2 make-up sessions scheduled before the end of August 2004.</p> <p>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.</p>	84%	Green
10	ADS	<p><i>Produce school publications and materials.</i></p> <p>9/3/2004 Milestone 1: Volume 5 has been sent to the printers and posted on the web.</p> <p>Milestone 2: The PLUS Basics brochure has been sent to GPO for printing with a due to the EDS Warehouse of September 30, 2004. The students brochure has been reviewed by a professional proofreader (an FSA requirement to be fulfilled before sending the document to OPA) and will be sent to OPA as soon as the edits are made. We still hope to get this brochure printed before the end of the fiscal year as well. There are 88 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.</p>	87%	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>		
		8/20/2004	<p>Milestone 1: The Student Aid handbook has had a date change and is still awaiting finalization and approval.</p> <p>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.</p>	80%	Green
13	BS		<p><i>Enhance program monitoring and oversight.</i></p> <p>9/7/2004 Total non-consolidation recoveries thru the end of August have now reached \$1.492 Billion, an increase of 22 percent from the same period in FY03. This figure represents 9.37 percent of the FY04 portfolio balance.</p> <p>The Life Time Default Rate calculation for FFEL has been completed. The comparison of FFEL and Direct Loan to the Cohort Default Rate and school type was presented to the General Manager of Borrower Services on September 3, 2004 and once she approves, it will be presented to Management Council.</p> <p>The stats for the cure rate on 180 days plus delinquent loans are reported monthly. The next report will be submitted mid September.</p> <p>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.</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>	94%	Green
14	BS		<p><i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i></p> <p>9/7/2004 This item is complete.</p>	100	Completed

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		<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%		
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15	BS		<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>																										
		9/7/2004	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																								
		8/20/2004	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																								
16	FPS		<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>																										
		9/3/2004	NSLDS Maintenance and Operations Activities operating efficiently. Work continues on GA and Lender Reasonability functionality, and the NSLDS Vulnerability Study.	92%	Green																								
		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																								
19	FPS		<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>																										
		9/3/2004	The contractor continues to implement and deploy changes to the FP Data Mart (The Consolidation Fee report was deployed).	99%	Green																								
		8/20/2004	The contractor deployed all issues related to Guaranty Agency data.	95%	Green																								
20	FPS		<i>Perform Financial Partners Portal operations activities.</i>																										
		9/3/2004	The Contractor has completed on-going maintenance support activities for this fiscal year. The final modification was deployed Tuesday, 8.31.2004.	100	Green																								
		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																								

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>			
		9/3/2004	No significant progress over the past reporting period.	97%	Green
		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
25	FPS	<i>Enhance program monitoring and oversight.</i>			
		9/3/2004	* The trial balance data requested by Ernst & Young (E&Y) from the GAs was processed. Financial Partners and CFO are reviewing a New Mexico response to an E&Y request for clarification of a discrepancy. * Reviews at the Tennessee and North Carolina guaranty agencies were completed, as well as all site visits for Nelnet. * Continue to make progress with the NSLDS vulnerability assessment. Report is tentatively planned for mid-September delivery.	93%	Green
		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
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>			
		9/2/2004	The audit is coming in to the home stretch, as a large number of 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.	90%	Green
		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
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>			
		9/2/2004	FSA has completed its final technical evaluation, based on the final proposal(s) for the System Internal Control BPA and task order one (FMS review) under that BPA. Awaiting final award notice. 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.	77%	Green
		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
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>			
		9/2/2004	We continue to make modifications to the FY2003 model. Presentations of the draft model, with all draft allocations complete, are scheduled for mid-September.	80%	Green

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		<i>Status Date</i>	<i>Comments</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
29	CFO	<i>Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.</i>			
		9/2/2004	Monthly Reconciliations: Reconciliations for July 2004 were completed within 14 days. Reconciliation Reengineering Project: CFO was advised 9/2/04 that EDS Task Order 3 has been signed by Contracts. This vehicle is being moved to the Oracle 11i 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/Accounting Division 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. Deva contractor staff set up draft formats for the FMS and FMSS reconciliation, which may be performed for the August reconciliations.	65%	Green
		8/20/2004	Monthly Reconciliations: Reconciliations for July 2004 have been completed in 13 days compared to the 30-day performance standard. 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.	45%	Yellow
30	CFO	<i>Manage FMS operations.</i>			
		9/2/2004	FMS Operations continues to run smoothly. FMS Operations staff distributed year-end closing schedule, looking for final verification of dates from responsible parties. Also, FMS management is beginning to consider next year's FMS operations support task order(s). Slight modifications to the incentives/disincentives are being considered, as is establishing option periods for shorter than one year.	93%	Green
		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
31	CIO	<i>Develop and deploy Enterprise Performance Test Architecture.</i>			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>	
				9/3/2004	Ombudsman Testing complete. Final report complete and delivered. Client acknowledged testing complete. eMPN – eMPN testing is proceeding. Performance environment is available. GC – Working on final (final) revision of GC document, will be delivered on September 8th. Week of September 13th through 17th EPT and PPS will be running simulations with the new Pollute servlet to identify potential JVM configurations. FAFSA 9.0 – LPAR migration is scheduled to be completed September 10th. Draft test plan was sent out August 31st, corrections and comments will be addressed in a new document on September 8th. Data modeling is complete, PIN and Student Access scripts are complete but will need to be revised for FAFSA 9 when it is released. ACRew (Application, Corrections, Renewal and Worksheets) script is in process as is FAA.	91%	Green	
				8/27/2004	eMPN - eMPN scripting is scheduled to begin this week. FAFSA GC - VM tuning approach and recommendations are being formulated. FAFSA 9.0 - FAFSA planning is on schedule to complete the test plan by August 27th. Scripting has begun on Framework, PIN and FAA. Library - Approach has been agreed to and prototyping is beginning.	90%	Green	
				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	
32	CIO	<i>Provide Enterprise and Data Architecture management.</i>						
				9/3/2004	The FSA EA Team was asked to review ED's EA Future State Vision and provide input for the Loans Line of Business (LOB) (FSA's area). The FSA EA Team feels that the ED-EA Future Vision has some inherent challenges since it does not align with OMB's LOBs. FSA EA presented discussion points to Denise Hill and then to the ED/EA team on the ED EA Vision. Discussion points include issues, recommendations for resolution and benefits. The ED EA Team is interested in pursuing the FSA EA Team's suggestions and revised methodology for documenting an EA, but not until after the September OMB Submission; therefore, FSA will support ED's request to provide Loans input to fit into its "vision" slide deck. Discussions will continue after this week. The FSA EA Team is also supporting the ED EA team on interpretation of the OMB Guidance. Denise Hill will brief Jerry Schubert on this information. The FSA EA Team was requested to perform a final review of the EA Section of the Exhibit 300's prior to the September 13th submission to OMB. Much effort was placed into aligning the Business and Performance reference models for this year's submission to align properly with OMB's Lines of Business. Denise Hill, FSA Chief Architect, will be a featured speaker at the 4th Enterprise Architecture conference presented by the E-Gov Institute focuses on practical lessons learned and actionable intelligence from those working to meet EA challenges in government today. Denise will speak on September 21st on the topic of Federal EA Reference Model implementations. Presentation was submitted this week. The FSA EA Team demonstrated that it is possible to import XML into Embarcadero E/R Studio, and using E/R Studio for developing the XML Repository resulting in improved data analysis capabilities, including preservation of keys.	91%	Green	

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			8/27/2004	<p>The EA Team reached agreement with Charlie Coleman and Mike Fillinich to build enterprise architecture reviews into the Production Readiness Review (PRR) and Post-Implementation Review (PIR) processes. The EA Team plans to enter the results fo the architecture reviews into the Investment Planning Council's (IPC) record. Denise Hill has been identified as a Subject Matter Expert (SME) to participate in the development of Phase II of the FEA Security and Privacy Profile. As an SME, Denise will participate in regular teleconference calls with the project team and provide FSA's position at the working level to ensure the technical soundness of the approach. Denise reviewed and provided comments on the draft profile. The EA Team prepared comments on the new "Service Component-Based Architectures Version 2.0" (SCBA) whitepaper released by the Architecture and Infrastructure Committee of the Federal Chief Information Officers Council. The comments were based on the comparison of the SCBA whitepaper to the activities related to the FEA reference models and the Capital Planning and Investment Control processes. A briefing was given to Jerry Schubert and Bill Leidinger before shared with OMB. While reviewing updates to the latest FSA Technology Policies, Standards and Products Guide, the EA Team realized a number of discrepancies between the documented standards and the inventory of software installed on production servers. The EA Team is working with VDC representatives to resolve the inconsistencies and arrive at product naming standards. As part of the EA task order, the team is prototyping a tool with the vision of creating an easy-to-use Excel-based interface to create OMB Exhibit 300s and auto-translate the Excel workbook to XML for transmission to OMB. A demonstration will be held on Wednesday, September 8th to FSA and ED representatives. The EA Team reviewed the Common Service for Borrower's approach to complying with the Section 208 - Platform for Privacy Preference (a.k.a. P3P) requirements and developing the FSA enterprise approach to a website privacy policy. The EA Team participated in the eAuthentication Assembly as part of the 2004 Software Developers Conference. 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.</p>	90%	Green
			8/20/2004	<p>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.</p>	89%	Green
			8/13/2004	<p>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.</p>	87%	Green

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		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
33	CIO	<i>Provide security and privacy support to FSA business units.</i>				
		9/3/2004	Finalizing Task Orders to be awarded against BPA as soon as it is awarded.		90%	Green
		8/27/2004	Waiting for BPA award. Contracts have stated that it should happen this week.		90%	Green
		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
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>				
		8/27/2004	ITA: ITA responded to one production page and 11 maintenance service requests this week. FPP, SAoW, and SP were successfully migrated to their WAS 5.0 prod environments; DNS changes have been confirmed. The team began installing WAS 5.1.1 in the FAFSA perf test env. Portal Server 5.01 was installed as part of our assessment of the Portal product. We are also providing environment support to CSC as they test Akamai Smart Source. EAI: EAI responded to one production page and 5 service requests (3 COD customer service inquiries). EAI Security Exit implementation and the MQSeries Channel Listener upgrade is complete in all dev and test environments and have been successfully tested. The team submitted a resource request packet to the VDC as part of the installation of WBI Message Broker.		90%	Green
		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
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>				

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		9/3/2004 QA Team received Post-Implementation Review (PIR) Process Description, Draft Version 2 on August 26, and is coordinating with select FSA and ED staff for review and comment. Final PIR Process Description is anticipated by September 22, for use in new PIR vendor re-compete efforts. On August 31, the IV&V team delivered the IV&V Final Report on 2004 FMS Contingency Plan and Disaster Recovery Test to FMS team. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	92%	Green
		8/27/2004 QA Team received Final CSB Phase I Development Security Risk Assessment. Met with Ben Leborys (CSB IV&V Liaison) and BSC Systems (CSB IV&V vendor) to review funding burn rate and CSB schedule timelines. eZ-Audits Release I Post-Implementation Review effort investment is on schedule. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	90%	Green
		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
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>		
		9/3/2004 PIRWG approved the eLoans Baseline Change Request on August 25. Changes approved included the exit strategy outlined in the eLoans Transition Strategy and changes in project schedule, milestone classification, and milestone scope. Participated in a Credit Bureau Roundtable hosted by HUD to identify opportunities to work together to improve the reporting and sharing of delinquency / default data. The September edition of InfoSource was sent to list subscribers on August 30th. Students.gov received 54,654 visits (1.4 million hits) during the week of August 22 to August 28, 2004 – more than 7,800 visitors/day.	92%	Green
		8/27/2004 The GovLoans team is continuing to prepare for the transfer of GovLoans ownership to DOL/GovBenefits on September 30, 2004. We are working with OMB and DOL to finalize a Memorandum of Agreement (MOA), which will be signed by Bill Leidinger (ED) and Pat Pizzella (DOL). Students.gov received 63,482 visits (1.6 million hits) during the week of August 15-August 21, 2004 – more than 9,000 visitors/day.	90%	Green
		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

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		<i>Status Date</i>	<i>Comments</i>		
		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
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>		
		9/3/2004	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 8/20/04)	91%	Green
		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
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>		
		9/3/2004	WEB STATS for the month of August: -Successful hits for the entire site=337,500 -Average visits=2,440 -Unique visits=1,580 The top five areas hit on FSANet: Home Page, FSA Reorg, CIO, Modernization and Admin Workforce Support. Most downloaded files: Modernization Task Orders & Deliverables.	95%	Green

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	8/20/2004	<p>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
43	CMS	<p><i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i></p> <p>9/3/2004 Controlled Mail - 211 letters were handled in the last two weeks and 1 letter is overdue.</p> <p>FOIA - 15 new cases were received in the last two and 7 cases were closed.</p> <p>Privacy - 2 new cases and 1 case closed.</p> <p>8/20/2004 Controlled Mail - 205 letters were completed and one is overdue.</p> <p>FOIA Cases - 13 new cases and closed 8 cases.</p>	95%	Green
44	CMS	<p><i>Develop and implement internal and external communications strategy.</i></p>	90%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		<i>%Complete</i>	<i>Status</i>
		<i>Status Date</i>	<i>Comments</i>		
		9/3/2004	<ul style="list-style-type: none"> -A new publications issue arose concerning ED/FSA's use of stock photos as it relates to the license agreements that accompany photos that FSA or our contract designers buy to use in our publication. OIG/OPA is working with the various POCs to find a solution these licensing issues. -FSA's publications training class will not be held Oct. 1. New date is forthcoming. -Hot Issue List to Sec. Paige on time. -Weekly Report to Sec. Paige on time. -FSA Weekly News to employees on time. -Daily newsclips on time. -FSA Comms met with EPMS (Fare/Hall) to discuss information tracking requests, specifically: look at the stats that Terri and others use in their speeches, such as Scope of Operations, using data to create consistent fast facts, for example, how many of this and how many of that...how we manage our data, how to have consistent data, where to house the data, who provides the data, how the data is calculated, etc. -The 2nd draft of the new employee orientation video was viewed and accepted by FSA Comms and FSAU managers. After minor tweaks, FSA will have a video to show to new employees. -Lobby monitor slides updated weekly with Dashboard stats, new fast facts are running. -Information Requests - to date there have been 363 requests and 14 are open. -FSA Comms will nominate FOTW for the Harvard Award, Innovations in American Government Awards, due Sept. 15. They will select five nominated initiatives. Each winner receives a \$100,000 grant. 	95%	Green
		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
46	EPMS	<i>Develop acquisition workforce.</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>		
		9/8/2004	APCMG staff, including Contracting Officers, Contract Specialists, and supporting staff, plus FSA Contracting Officer's Representatives (CORs) have received on-the-job experience, plus acquisition training (or will receive acquisition training prior to the end of FY04). Training has included: Department of Education in-house training, training by other Government agencies, and contracted training. Training includes: acquisition planning, contracting, contract performance monitoring, accountability for government furnished property, Earned Value Management (EVM), Market Research, and business process analysis. The practical experience and training has increased job knowledge and skills, and has improved both individual and team performance.	100	Completed
		8/20/2004	No change from last entry.	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
48	EPMS		<i>Continuously update and monitor procurement internal controls.</i>		
		9/8/2004	Process improvement is continuous. The FY04 portion has been completed successfully. The FY05 portion will be included in the FY05 Performance Plan.	100	Completed
		8/20/2004	No change from last entry.	92%	Green
49	EPMS		<i>Increase contract dollars awarded to small businesses.</i>		
		9/8/2004	Small business awards, to date, in FY04 indicate that FSA will exceed FY03 awards, but final data will not be available until FY04 is closed out.	100	Completed
		8/25/2004	Task evaluated as complete on 8/25/04. In FY03 FSA awarded \$3,777,091.38 to small businesses. In FY04 FSA awarded \$12,749,974.89 to small businesses for an overall increase of 70%.	100	Completed
		8/20/2004	No change from last entry.	96%	Green
50	EPMS		<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>		
		9/3/2004	Major FSA projects are now incorporated into PMO oversight. This includes monthly project reporting as well as routine updates to the IPC.	100	Completed
		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
52	ADS		<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>		
		9/3/2004	No change to last status report.	70%	Red

<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 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
53	EPMS	<i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i>		
		9/2/2004 General FSA's response to the GAO draft report, delivered on 9/2/04, focuses on the significant accomplishments we've achieved over the past two years, some of which were recognized in GAO's January 2003 report but not in the current draft. There is a technical comments matrix attached to the response as well as a detailed human capital implementation plan. FSA will keep GAO informed over the next several months of our accomplishments related to any of the high-risk issue areas, e.g., foreign schools FFELP risk assessment and COACH module due 9/30/04, Data Strategy 2.0 deliverables, progress on any of the systems integration initiatives, progress on the human capital plan implementation, FY 2005 annual plan, and especially progress in CMO on issues raised by GAO or OIG.	93%	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>		
		<p>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."</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>	89%	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>	90%	Yellow
56	CFO	<p><i>Review Credit Reform estimates.</i></p> <p>9/2/2004 Technical experts documented certain remaining components of the Department's credit reform estimation business processes. The team compiled and consolidated its documentation into a completed draft report, and submitted the draft to the Credit Reform Work Group for review and commentary. Comments are due by September 15th. This document, and an analysis of corresponding technical requirements, will form the basis for making recommendations for FY05 improvements.</p>	83%	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>			
		8/20/2004	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.	71%	Green	
58	CFO	<i>Support the implementation of Oracle Federal Financials Release 11i.</i>				
		9/2/2004	Continued to attend functional sub-team meetings to refine system requirements. Began coordinating discussions with FSA CFO personnel to discuss O11ie data conversion and the need for transactional details versus period-end balances. Facilitated a meeting FSA OCIO personnel to define system "control" with O11ie. Prepared a follow-up diagram depicting system "control" and distributed for review and comment, in the context of FFEL data flow options. Facilitated on-going meetings with FSA CFO personnel regarding Audit Trails and Reconciliations for inclusion in updates to the Audit Trails and Reconciliations White Paper.	89%	Green	
		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	
59	CFO	<i>Implement automated budget funding entry solution.</i>				
		9/2/2004	Both the EDCAPS and FMS contractors have completed development, unit testing, and intergation testing. User acceptance testing is on-schedule for completion on 9/7. FMS and EDCAPS user guides have both been finalized. 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.	90%	Green	
		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	
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>				
		9/7/2004	ACS has requested a Phase I implementation date change from October 8, 2004 to November 21, 2004. Migration of the new CSB consolidation functionality continues under this new schedule. The CSB Data Mart (which replaces the CMDM and DLDM data marts) continues successful parallel operations. Implementation is still scheduled for October 1, 2004.	85%	Green	
		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	
67	ADS	<i>Prepare to implement IRS data match.</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>			
		9/3/2004	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 will be conducting a briefing on 09/08/04.	78%	Green	
		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	
68	AWSS	<i>Continue Learning Coupon program.</i>				
		9/1/2004	No change.	99%	Green	
		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	
69	AWSS	<i>Provide Career Zone services.</i>				
		9/2/2004	The Career Zone has served 108 new FSA clients in the first fiscal year. The goal of 75 was exceeded by 44% and this number is expected to rise when the final results of August and September are calculated. With a continued evaluation score of 4.5 or better every month in Counseling, Workshops and Training, the Career Zone has met and exceeded targeted goals. The Brown Bag Book Club voted to read, for the September 8th meeting, How Full is Your Bucket by Tom Rath & Donald Clifton. The Brown Bag Video Presentation is showing Coping with Change from the Cameron-Hill & Yates Seminars. In Career Training, we have been able to offer 3 Contracts Training Courses in the past month with a select number of spaces reserved for FSA staff; these courses being extremely popular, has made this an excellent accomplishment.	100	Completed	
		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.			
70	ADS	<i>Increase Student Financial Aid program awareness.</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>		
		9/3/2004	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 were conducted 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	80%	Green
		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
71	ADS		<i>Reengineer EDEExpress.</i>		
		9/3/2004	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 100% complete. The comment period for the System of Records Notice (SORN), which was posted in the Federal Register on July 23rd, is complete. The PRR is scheduled for September 9th.	98%	Yellow
		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
73	CIO		<i>Develop FSA Security and Privacy Architecture Pilot.</i>		
		8/27/2004	Evaluated the response to the security Architecture SOO from the ILSC contractor. In the process of awarding the contract. Had Multiple discussions with IBM on implementation strtaegy for Tivoli tools and the potential technical issues to be addressed for successful implementation.	100	Completed
		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 theILSC 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
74	AWSS		<i>Implement Leadership Excellence development training.</i>		
		9/3/2004	Scope change approved at 8 August IPC, changes percentage complete to 99% and Status to Green.	99%	Green

FSA Milestone Status Report

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
1	ADS	Implement student aid awareness initiatives.						
			1.1	Leverage partnership activities to disseminate FSA information.				
					9/3/2004	SAA participated in one continuing partnership activity during this reporting period, the 'Blacks in Government' (BIG) conference from August 16 - 20. Forty-one volunteers from across the FSA enterprise staffed the FSA exhibit at the 26th Annual National Training Conference in DC. The theme of the conference was "Promoting Knowledge, Growth and Flexibility in a Global Government." This conference afforded a large number of the staff the opportunity to provide information and materials to other government employees and learned a lot from the experience of direct contact with our customers.	100%	Complete
					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
			1.2	Publish accurate and timely information that meets the needs of our audience.				
					9/3/2004	A design has been chosen for the cover of the Student Guide. The Counselor's Handbook went to the proofer on 8/30 and is scheduled to go to the Office of Public Affairs (OPA) next week. However, there is an unanticipated issue concerning the right to use photographs in the Counselor's Handbook. This has not been an issue with past editions. This could affect the Student Guide as well. The intellectual property rights attorney is looking into this issue.	50 %	Green
					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
			1.3	Disseminate information directly to target audience.				

Milestone# Action Item

Status Date Comments %Complete Status

9/3/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 9/1/04, SAA has provided federal student aid information and distributed materials to approximately 88,184 persons as follows:

August 16-20, 2004	Blacks in Government (BIG)	3,000
August 21, 2004	Team Summit 2004	500
August 28-29, 2004	Latino Summer Fest	100

Not reported on previous report

March 10, 2004	Tyrone, PA School District	3,000
March 2, 2004	Tulsa Graduate Studies Fair	100
February 19, 2004	AISES Leadership Conference	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.

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:

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.

1.4 Respond accurately and timely to requests.

9/3/2004 For the period 8/16/04 – 8/27/04, the Editorial Services Contract responded to the following correspondence: 99 % Green

81 controls---(86 prior period)-----turnaround (3 days)=100%
 1608 non-controls---(1400 prior period)----turnaround (2 days)=99%
 2599 e-mails---(2295 prior period)-----turnaround (2 days)=100%

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%

1.5 Reach customers through Student Aid on the Web.

9/3/2004	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 (08-15- to 08-28-04) are 806,481 and 15,005,196 respectively. During the same period last fiscal year we had 603,260 visits and 9,425,242 hits. This represents FY04 increases of 33.7% for visits and 59.2% 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 46,929 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
8/20/2004	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

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

2.1 Monitor customer feedback to improve services.

9/3/2004	Currently waiting for August IFAP subscription data to evaluate progress. Nothing significant to report on other initiatives at this time.	95 %	Green
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

<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	ADS	Expand eZAudit initiative.						
			8.1	Be Prepared for Contract Award.				
					9/3/2004	Due diligence was completed Aug 24. Questions from contractors are due Sept 3.	90 %	Green
					8/20/2004	The recompetes 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
			8.2	Complete first full cycle of processing (all school types).				
					9/3/2004	As of 8-30, 4,926 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'd through the end of the year.	100%	Complete
					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'd through the end of the year.	100%	Complete
			8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.				
					9/3/2004	As of 8-30-04, 4,726 schools have registered.	92 %	Green
					8/20/2004	As of 8-15-04, 4,598 schools have registered.	92 %	Green
9	ADS	Enhance program monitoring and oversight.						
			9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year.				

	9/3/2004	<p>For the biweekly period 8-16-04 to 8-29-04, 89% of the audits were resolved on time. Cumulative since 10-01-03, 87% 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 9 audits on administrative stay.</p> <p>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 9 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one quarter of 1 percent.</p>	90 %	Yellow
	8/20/2004	<p>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.</p> <p>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.</p>	85 %	Yellow
9.2	Continue to measure school monitoring to assess overall compliance trends.			
	9/3/2004	<p>A simplified NSLDS transfer student monitoring option for schools with additional locations was implemented 8-18. Schools do not have to register each location, as long as they report all students under the main OPEID. Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles. There are 630 main locations that do not have a profile as of 8/23/2004. The Administrative Actions & Appeals Division has received 137 referrals (67 for IPEDS violations) for administrative action and initiated 13 debarments from 10-01-03 through 9-01-04.</p>	90 %	Green
	8/20/2004	<p>We briefed OPE on 8-16 on the FY 2004 Compliance Initiative. They are reviewing the training materials.</p> <p>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.</p>	85 %	Green
9.3	Conduct School Relations initiatives.			
	9/3/2004	<p>Cohort default rate work has begun on a database that includes Hispanic Serving Institutions, HBCU's, and Tribally controlled schools. This is in the scope of the Late Stage Delinquency project. Also, major work has been completed in the various webex trainings in PELL and Direct Loans throughout the regional offices.</p>	95 %	Green

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					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.	91 %	Green
			9.4	Conduct the Experimental Sites initiative.				
					9/3/2004	Work continues, but no significant change in status of the analysis report. FSA staff are completing the appendices to the draft report. We notified schools about the revised reporting templates and next reporting date of November 15, 2004.	94 %	Green
					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.	91 %	Green
			9.5	Administer the Quality Assurance program.				
					9/3/2004	We completed all 19 training sessions for QA schools on Phase I of the ISIR Analysis Tool using WebEx technology. We also completed the 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.	100%	Complete
					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
			9.6	Conduct vulnerability assessment.				
					9/3/2004	Work has begun on developing the report and action plan. The project is on track to complete the assessment and action plan by the September 30, 2004 due date.	75 %	Green
					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
10	ADS	<i>Produce school publications and materials.</i>						
			10.1	Annually update and disseminate the Federal Student Aid Handbook.				

<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>				
			9/3/2004	Volume 5 of the FSA handbook has been posted to the web and sent to the printer. Volumes 3 and 4 are currently in the finalization process.	80 %	Green
			8/20/2004	Project turned green after a date change. The project is still in the review process currently.	70 %	Green
		10.2 Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.				
			9/3/2004	The PLUS Basics brochure has been sent to GPO for printing with a due date to the EDS Warehouse of September 30, 2004. The students brochure has been reviewed by a professional proofreader (an FSA requirement to be fulfilled before sending the document to OPA) and will be sent to OPA as soon as the edits are made. We still hope to get this brochure printed before the end of the fiscal year as well. Currently, there are 88 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.	93 %	Green
			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
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.				
			9/7/2004	Total non-consolidation recoveries thru the end of August have now reached \$1.492 Billion, an increase of 22 percent from the same period in FY03. This figure represents 9.37 percent of the FY04 portfolio balance.	97 %	Green
			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
		13.2 Update FSA-wide risk management and default prevention inventory.				
			9/7/2004	Nothing new to report.	95 %	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>
					8/20/2004	Nothing new to report.	95 %	Green
			13.3	Complete the work on the implementation of the life-time default rate measure.				
					9/7/2004	The Life Time Default Rate calculation for FFEL has been completed. The comparison of FFEL and Direct Loan to the Cohort Default Rate and school type was presented to the General Manager of Borrower Services on September 3, 2004 and once she approves, it will be presented to Management Council.	95 %	Green
					8/20/2004	Nothing new to report	90 %	Green
			13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.				
					9/7/2004	The stats for the cure rate on 180 days plus delinquent loans are reported monthly. The next report will be submitted mid September.	90 %	Green
					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
			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
16	FPS	<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>						
			16.1	Perform cohort default rate calculations, send, and post.				
					9/3/2004	QA/QC process is completed. Files that need to be printed have been provided to contractor. Electronic packages are ready to submit to domestic schools via SAIG on Saturday, 9.11.2004.	90 %	Green
					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 file between PEPS and NSLDS have been exchanged successfully. Rates will be electronically sent on Monday, 9.13.2004.	85 %	Green
			16.2	Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.				

Milestone# Action Item

Status Date Comments %Complete Status

9/3/2004 Completed. 100% Complete

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

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

9/3/2004 The July Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month rose slightly 98.90%. August Benchmarks to be calculated mid-September. 80 % Green

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

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

9/3/2004 Programming continues on monthly GA reasonability. Plan to move into production in September. 85 % Green

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

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.

9/3/2004 Testing of the Consolidation Fee Payment was completed and these changes were deployed on Sunday, 8.29.2004. Monthly report submitted. 100% Green

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

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

9/3/2004 Completed. 100% Complete

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
					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
			19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.				
					9/3/2004	Monthly data loads were received on Tuesday, 8.31.2004. QC process started on Wednesday, 9.1.2004. QC report will be submitted with the next update.	99 %	Green
					8/20/2004	No data load was extracted during this reporting period. Next extract will occur the week of August 30.	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.				
					9/3/2004	Monthly Report submitted, no other outstanding issue, this item is now closed. Completion date is Tuesday, 8.31.2004.	100%	Green
					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
			20.2	Maintain current and relevant information to financial partners' user community.				
					9/3/2004	A minor change was made to FP Organization chart (Pam Eliadis was added as Director of NSLDS). Monthly report submitted. Completion date is Tuesday, 8.31.2004.	100%	Green
					8/20/2004	The Team deleted several items from the Interest Rate page and the What's new page.	98 %	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>						
			22.2	Prepare performance measure assessment and benchmarking reports.				
					9/3/2004	No significant progress over the past reporting period.	97 %	Green
					8/20/2004	Draft report will be published Monday, 9.6.2004.	97 %	Green
			22.3	Evaluate new applications for VFA.				

<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	Completed.	100%	Complete
			22.4	Foster effective working relations with guaranty agencies during scheduled site visits.				
					9/3/2004	No significant progress over the past reporting period.	88 %	Green
					8/20/2004	Continued to work with NSLP/EAC and USAF regarding cost neutrality of their proposed VFAs. Held conference call with ECMC 88 % 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
25	FPS	Enhance program monitoring and oversight.						
			25.1	Participate and provide Financial Partners Channel support for ED audit.				
					9/3/2004	All GA Trial Balances requested by Ernst & Young (E&Y) were received and processed. The New Mexico GA has responded to an E&Y request asking for an explanation of a balance amount difference between the records of the GA and DCMS. Financial Partners (FP) and CFO are reviewing New Mexico's response for completeness. FP will continue to coordinate and monitor E&Y's requests.	90 %	Green
					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
			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.				
					9/3/2004	During this reporting period completed two-week reviews of the Tennessee and North Carolina guaranty agencies. Completed all site visits for the Nelnet servicer review.	90 %	Green
					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
			25.6	Conduct vulnerability assessment.				

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					9/3/2004	Draft NIST questionnaire was delivered and is under review. Some items are VDC related and will be provided to the VDC for assistance. Report will be delivered in mid-September. 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.	75 %	Green
					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
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.					
					9/8/2004	See previous Entry.	100%	Cancelled
					8/25/2004	The IPC agreeded to remove this milestone requirement.	90 %	Cancelled
					8/20/2004	No change from last entry.	90 %	Green
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>						
		48.2	Establish reporting process to monitor vendor performance.					
					9/8/2004	Process improvement is continuous. The FY04 portion has been completed successfully. The FY05 portion will be included in the FY05 Performance Plan.	100%	Complete
					8/20/2004	No change from last entry.	85 %	Green
54	AWSS	<i>Deliver workforce development and support programs.</i>						
		54.1	Continue Intern Program.					
					9/2/2004	Closing out interns that have left and inventorying the computer and phones and other equipment. Finishing up summary reports.	98 %	Green

		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
54.2	Conduct FSA Orientation.				
		9/3/2004	Classroom session of FSA NEOP was conducted on September 1, 2004. The FSA NEOP website is currently being reviewed.	90 %	Green
		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
54.3	Implement results of One-ED Competitions.				
		9/3/2004	The Department has indicated intent to award the contract before the end of the fiscal year and has requested final proposal revisions.	25 %	Yellow
		8/20/2004	None.	25 %	Yellow
54.4	Update Skills Catalog/Learning Tracks.				
		9/2/2004	FSA Skills Catalog is scheduled to go to the proofreader on September 10. Once we receive it back, we will make the revisions and send it to GPO for printing no later than September 20.	97 %	Green
		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
54.5	Implement Workforce Alignment Strategy.				
		9/3/2004	Union negotiations complete. All personnel actions which needed to be implemented with an effective date of 9/19/04 have been initiated.	99 %	Green
		8/20/2004	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

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>	<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
61	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.				
					9/3/2004	Conducted working sessions during the week of August 30th for the NSLDS and CMO functional gap areas of deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis (Final).	78 %	Green
					8/27/2004	Conducted working sessions during the week of August 16th for the NSLDS functional gap area of deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis (Final). Task Order 152 Modification 02 was awarded on 8/19/04 to extend the delivery of the lender payment analysis and to provide an executive narrative of the Target State.	74 %	Yellow
					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
			61.9	Develop the detail Data Quality Execution Plan.				
					9/3/2004	Held a Data Quality Steering Committee meeting on Thursday, August 26th to discuss data management and FSA's next steps with data quality and data management.	80 %	Green
					8/27/2004	Held a Data Quality Steering Committee meeting on Thursday, August 19th to discuss the Improvement and Oversight Phases of the Data Quality Implementation Methodology.	77 %	Yellow
					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
			61.10	Develop a holistic XML Management Plan.				
					9/3/2004	No Change.	73 %	Yellow
					8/27/2004	No Change.	73 %	Yellow

Milestone# Action Item

Status Date Comments %Complete Status

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

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

9/3/2004 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. 90 % Green

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

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

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

9/7/2004 Development - The conversion of DL Servicing and all Loan Consolidation data continues but the completion date has been rescheduled for November 21, 2004. The porting of the DLSS to HP Unix and development of the Common Data Repository are progressing well. Reengineering loan consolidation, implementation of the Tivoli Access manager, and the Seible upgrade (from v6.3 to v7.5) is underway. The schedule is being monitored closely. Phase 2 development activities have begun with many Joint Applications Development (JAD) meetings being scheduled. 85 % Green

Infrastructure - All data communications circuits and routers have been installed.

Operations - Efforts continue to eliminate "negative balance" and "small balance" DCS accounts.

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					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
70	ADS	Increase Student Financial Aid program awareness.						
			70.2	Develop and implement long-term mass marketing strategy.				
					9/3/2004	Procurement on schedule. Task Order released 8/19. Due diligence to be conducted 8/24 - 9/26. Responses to the Task Order were received on Tuesday 8/19.	80 %	Green
					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
71	ADS	Reengineer EDEExpress.						
			71.3	Implement Return to Title IV Web Release.				
					9/3/2004	FSA Acceptance Testing is 100% complete. The comment period for the System of Records Notice (SORN), which was posted in the Federal Register on July 23rd, is complete. The PRR is scheduled for September 9th, and the code will be merged to the web on Sunday, September 12th.	96 %	Yellow
					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