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**Change History Log:**

**December 14, 2000**

**In Response Reply to: 01EDU0186S**

Department of Education  
 Student Financial Assistance  
 Carol Seifert  
 Contracts Office Technical Representative

Subject: Contract # ED-99-DO-0002  
 Task Order # **8.1 Program Management Office**  
 Deliverable **8.1.2: "End State Vision" (also known as Target State Vision)**

Dear Ms. Seifert:

Enclosed is the **"Target State Vision"** that is required by the subject task order. Attached are suggested changes from the reviewers (Steve Hawald, John Reeves, Jennifer Douglas, and Jim Lynch). Mr. Reeves and Ms. Douglas supported the document and did not request changes. We anticipate a future revision to reflect comments from Greg Woods after the Modernization Blueprint is finalized.

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<b>Suggested Changes/Comments</b>	<b>Page<sup>i</sup></b>	<b>Author</b>	<b>Date</b>	<b>Change Made Y/N</b>	<b>Comment</b>
The rest looks great.	All	Steve Hawald	12/8/00	N	No change requested by comment
<u>Very</u> good. Of course comments. Would like to sit & discuss in more detail (ed: emphasis in original)	All	Jim Lynch	12/8/00	N	No change requested by comment
Pg 12 and 13 show CBS retired and we are committing \$ 8M for a new one.	12-13	Steve Hawald	12/8/00	N	Believe that comment meant to say CBS retired. CBS is replaced by COD. Expect that this is what Mr. Hawald was referring to by a "new system."
NSLDS will require an EDW for the data marts- pg. 14	14	Steve Hawald	12/8/00	Y	Data Marts and Data Warehouse refer to the same technology. Data Marts tend to refer to situations where the technology uses a subset of data to address a specific problem (e.g., default trend analysis for financial partners.) Renamed the "Data Mart" box on the application architecture picture to "Data Warehouse and Data Marts."



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Pg 16 thru 18 does not discuss created the SFA knowledge worker and supporting those that are coming to work to SFA aka younger and better trained workers.	16-18	Steve Hawald	12/8/00	N	SFA Workforce Support Framework intended to provide all SFA workers with the key skills, training, tools, etc. needed to deliver high performance. Recruiting new personnel as needed is addressed by Resourcing. The Vision notes that Resourcing must ensure that each part of the organization receives appropriately skilled people in needed numbers.
Pg 20 has an old top 10 list	20	Steve Hawald	12/8/00	Y	Top Ten Modernization Priorities replaced by PBO Victory Initiatives.
Pg 23-24 does not talk about links to explore financial aid awards by school, dept or student as well as more links to school info to help the student to pick the right school so they finish and pay back the loan and other stuff like campus crime stats.	23-24	Steve Hawald	12/8/00	N	The referenced pages contain the Sept 1999 Blueprint vignettes and these vignettes do not address the capabilities Mr. Hawald. In order to show continuity with earlier plans, one goal of the vision is to avoid rewording these vignettes. The capabilities suggested by Mr. Hawald are addressed on the Portal Services for Students chart under Counseling.
No mention of using datamining tools for trend analysis on defaulted loans	All	Steve Hawald	12/8/00	Y	Added clarification to description of Data Marts in Application Architecture section.
<i>In reference to next steps</i> "Need 'as-is' and 'to-be' both ----- Also drill down so each employee knows his/her contribution to big picture – part of GPAS re-engineering.	3	Jim Lynch	12/8/00	Y	Expanded first "Next Step" to address comment.
<i>In reference to depiction of Integrated SFA process:</i> " While this is a valid representation, it is not so easily understood. Need to focus on how better to present."	5, 7	Jim Lynch	12/8/00	N	No change made in this version. Expect that ongoing work with Greg Woods will resolve any concern in this area.



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<i>In reference to unforeseeable changes that can affect vision: "Also political changes, e.g., change in administrations, Secretary of Education, etc."</i>	6	Jim Lynch	12/8/00	Y	Added "political changes" as a force that could change the vision.
<i>In reference to explanation of Customer Relationship Management Umbrella: "At first glance, CRM implies call centers – more than that --- e.g., <u>how</u> we relate, <u>how</u> we deliver, <u>what</u> we deliver, etc."</i>	7	Jim Lynch	12/8/00	Y	Expanded description of Customer Relationship Management Umbrella to clarify that its impact goes well beyond call centers.
<i>In reference to SFA Technology Architectures explanation: "Need to emphasize support to programs vs. infrastructure for sake of infrastructure."</i>	10	Jim Lynch	12/8/00	Y	Added comment to emphasize that infrastructure will be implemented on an as-needed basis in concert with delivery of improved business capabilities
<i>In reference to explanation of Data Domain: "Need to refer here to EDM/ERM"</i>	11	Jim Lynch	12/8/00	N	EDM and ERM are specific analysis techniques related to data design and management. While applicable to this area, preferred not to introduce this level of technical detail to this section of vision.
<i>In reference to explanation of Enterprise Application Integration Domain: "But isn't EAI more of a short-term fix where we re-engineer as opposed to long-term solution"</i>	11	Jim Lynch	12/8/00	N	EAI is part of SFA's long term technical architecture.
<i>In reference to depiction of SFA portal on Application Architecture diagram: "Assume this includes FMS transactions from GA's, lenders, schools"</i>	12	Jim Lynch	12/8/00	N	Portal, along with direct data exchanges between school and financial partner systems are depicted in the architecture as assumed.
<i>In reference to depiction of FARS as part of FMS on application architecture diagram: "if this is i.e.FARS ...gone"</i>	12	Jim Lynch	12/8/00	Y	FARS shown within FMS is the FARS that supports direct loans accounting as a subsidiary ledger to FMS. We revised the application architecture diagram to show i.e.FARS as a tombstoned system since FMS is SFA's part of the overall Education Dept. strategy for replacing i.e.FARS.



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<i>In reference to explanation of security filter on application architecture: "How much do we have to play with ED CIO?"</i>	14	Jim Lynch	12/8/00	N	Target State Vision not intended to address organization roles and responsibilities between SFA and the Education Department.
Various small wording changes	14, 28	Jim Lynch	12/8/00	Y	Changed as requested
<i>In reference to the word 'New' prefacing organization on the SFA Workforce Support Framework chart: "or is it 'evolving'"</i>	16	Jim Lynch	12/8/00	N	"New" organization was intentional and intended to refer to the new SFA organization implemented in 1999.
<i>In reference to examples provide to explain SFA Workforce Support Framework concept of performance support: "but also travel services, ability to procure, "how-to" guides, etc. ---- just more than electronics</i>	16	Jim Lynch	12/8/00	Y	Added non-electronics examples as suggested.
<i>In reference to explanation of Communication: "But we also must demand that our leaders communicate too"</i>	17	Jim Lynch	12/8/00	Y	Expanded explanation to address this point.
<i>In reference to explanation of Resourcing: "Advise a re-write --- you're correct --- the words used could be misinterpreted.</i>	17	Jim Lynch	12/8/00	Y	Revised wording to reduce potential for misinterpretation.
<i>In reference to Employee Vignette: "Alternative pay systems, e.g., broad-funding retention and recruitment bonuses, education opportunities, etc.</i>	28	Jim Lynch	12/8/00	Y	Vignette did not address these issues. Instead, added comment to description of Performance Management.
<i>In reference to list of Portal Services for Schools chart, Funds Administration Center section: "Process financial transactions w/ SFA FMS"</i>	31	Jim Lynch	12/8/00	N	Application architecture does address these transactions and addressed in this chart by last box to the right in this section.
<i>In reference to Portal Services for Employees, Financial Aid Data: "Status of Funds – program and operating</i>	33	Jim Lynch	12/8/00	Y	Added portal service for employees to access this information.
<i>In reference to Portal Services for Employees, SFA University Training: Formal Education</i>	33	Jim Lynch	12/8/00	N	Not expected as a Portal Service and so not added to this chart.
<i>In reference to inputs to IRB on the planning chart: "Need plans and budgets here – that's the critical annual planning step"</i>	37	Jim Lynch	12/8/00	N	To be addressed during review with Greg. Need to be sure that any depiction of an annual planning step reflects his priorities.



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<sup>i</sup> Refers to page numbers in Target State Vision Draft 3B as given to Management Council members on 12/1/00.