

# SFA Modernization Partner Management Services Summary

June 10, 2000

**Table of Contents**

1.0 Program Status ..... 3  
1.1 Introduction..... 3  
1.2 Program Overview ..... 4  
1.3 Value Points..... 6  
2.0 Master Schedule ..... 8  
3.0 Summary Of Program Risks & Issues..... 9  
3.1 Program Risks ..... 9  
3.2 Program Issues ..... 10  
4.0 Key Accomplishments This Month and Plans For Next Month ..... 12  
5.0 Appendix: Deliverables Log..... 27  
6.0 Appendix: Modernization Program Scorecards ..... 28

## **1.0 Program Status**

### **1.1 Introduction**

This Management Services Summary is being produced as a deliverable of the SFA Modernization Partner Task Order. This report covers the month of May 2000 and includes information on the overall status of the Program, a summary of key Program Risks, achievements for the month, planned work for the next month, and performance of the Program against schedule.

The format and content of this report are based on the guidelines provided in the FY2000 Program Management Task Order, standard project status reporting techniques, and input from SFA management personnel. The purpose of this report is to provide SFA senior management with information related to the performance of the Modernization Program team.

These monthly summaries will be refined to improve their usefulness and the value they provide. Please address any suggestions regarding the content or format of these reports to the Modernization Program Office Manager (elisabeth.s.schmidt@ac.com or 703.947.2644).

## 1.2 Program Overview

### Program Status

In the month of May, the Program team has delivered some key deliverables:

#### **DLSR and CRM Call Center IPT**

- The DLSR Reengineering Options documents the opportunities for improvement in the Direct Loan Servicing and summarizes the work done by the IPT. Each Reengineering Option documents the business problem, potential solutions, benefits, net financial benefit, risks, systems affected, and the final recommendation from the IPT
- The CDS retirement business case documents the functions of the Central Data System and the business reasons for removing it from the Direct Loan Servicing process. The background for CDS, savings, present and future servicing systems interfaces, tasks, and assumptions and risks are presented in the document.

#### **FMS Oracle Financials**

- Solution Demo (Phase II) demonstrated the vanilla applications in support of high-level scenarios for each Phase II program.

#### **FP Transformation**

- Submitted and obtained approval for the Current Environment Assessment deliverable, which documents a list of key functions for each core process, responsibilities, process flows, list of interfaces, volume information, and costs. The Financial Partners processes that will be reviewed include GA/Lender payment, oversight/technical assistance, policy and analysis and contract management. The purpose of this document is to aid the team in understanding the current environment with respect to “best-in-business” processes and practices. The document will also assist in the identification of reengineering options and provide baseline information for the business case.
- Submitted and obtained approval for the Initial Project Management Plan deliverable, which will assist the FP organization to establish a self-sustaining capability (process, tools, and resources) for coordinating and managing on-going Financial Partner change initiatives. The deliverable consists of an Initial, Interim, and Final Deliverable. The Initial Project Management plan provides an initial package of methods and materials that documents project management principles and tools. Included will be a draft of the project management approach, detailed workplan, and templates for project management tools required for status reporting, issues tracking and task management.

#### **CIO**

- *Ombudsman – Seibel Implementation Specifications* contain the documentation of the screens and data requirements for the Ombudsman system. It also defines and describes the CRM Tools for installation and implementation.
- *Mad Dog – FAFSA on the Web Report (FOTW)* evaluated the performance of the FOTW application and determined the factors that caused the performance issues during the week of February 27<sup>th</sup>, 2000. The scope of the analysis covered the following technical areas:

- Network
  - Unix and Web Server
  - Database
  - Application Assessment
- Findings were described along with Immediate and Future Recommendations to address each of the findings.
- *FAFSA Usability Report* documents the problems identified with the usability and functional operations of the system identified through site visits to New York University and review of “Dos and Don’ts” guidelines published for students and schools. These sources along with direct review of the FAFSA on the Web system during a previous task order provide an inventory of problems with use of the system. This work effort included analysis of the problems, with estimates of what it will take to resolve each of the problems. The work effort will also include an estimate of the effort required to re-engineer the overall FAFSA on the Web system.
- *Intranet – Content Design* contains the design of content for the channels/offices for Release 2.0 of the SFA Intranet. The deliverable includes the graphical design of the sites for Students, Schools, Financial Partners, Analysis, HR, Contracting and Acquisitions, Employee Services, SFA University, CFO and Ombudsman
- *Intranet – Release 2.0 Content Population - additional 100 pages* delivers the next 100 web pages of web content formatted for the Web as delivered by SFA.

**Program Management Office – Partner Management**

- *Legacy Contract Transition Plan* established the contracting approach for legacy contracts that assures uninterrupted, mission-critical service to SFA organizations, its customers and partners while at the same time supports the execution of the Modernization Blueprint initiatives outlined in the Modernization Sequencing Plan.

## **1.3 Value Points**

### **Common Origination and Disbursement Phase II**

- Prepared SFA Leadership for interaction with community at 2 conferences:
  - Tribal Colleges (Schools)
  - National Council of Higher Education Loan Programs (NCHELP)

### **DLSR and CRM Call Center IPT**

- Prepared Best Practices Document on Electronic Booking, created discussion document on Collections best practices, and created Interest rate lock Best practices discussion document which assisted the client in reshaping department processes. Provided management guidance for developing DCS Imaging Initiative.

### **FMS Oracle Financials**

- Provided advice on negotiating Oracle software licenses that helped to decrease cost by over \$100,000.

### **FP Core Process Reengineering**

- Coordinated reengineering initiative with current NACHA initiatives for the GA/Lender Payment processes to affect integrated solutions.
- Identified potential schedule conflict for implementation of reengineered Lender 799 Form within Oracle environment. Proposed implementation be postponed until October 2001 instead of March 2001 to realize significant cost savings.
- Conducted meeting with GA/Lender reengineering team and FMS regarding Form 2000 initiative. Discussed functions, phases, timeline, and cost. Established a need for FP team to determine and document impacts of having one FMS release per year falling on each October 1<sup>st</sup>.

### **FP Project Management and Facilitation**

- Provided support for capturing key cost and recommendations for FP divestiture/ownership issues. Results were provided to Greg Woods for a key meeting.
- Provided support for analyzing the depletion of federal reserve funds and associated fees. Results will be provided to Greg Woods for a key meeting.

### **FP Employee Development/Organizational Transformation**

- Conducted fourth Visioning Session on 5/25 including FP middle managers to review FP mission and vision statement for Financial Partners
- Conducted Change Agent Workshop to kick-off Change Agent Program
- Began transition discussions with Linda Hall, new Acting GM, to orient her to FP Transformation program, work efforts, and players
- Prepared extensive FP Transformation Briefing Binder for Linda Hall

### **CIO**

- CIO delivered a Sneak Preview of the SFA Intranet with additional functional sections of the system built. This provides information for employees out of the Employee Services section, communications information from the SFA Communications section and additional CIO pages to provide information on technology status, projects and reference information.

### **Program Planning & Reporting**

- Began process of integrating SFA and CIO status and issue reporting processes to avoid duplication of efforts and to ensure that SFA/CIO counterparts are working more closely together and reporting progress accurately.
- Introduced bi-weekly scorecards to the Management Council meeting. These scorecards will ensure that the appropriate issues are elevated to the Management Council for their information or action as well as provide a high-level synopsis of progress-to-date.

### **Organization Transformation**

- Incorporated industry best practices of human capital design and development, as well as SFA experience into a “90 Day Plan” for SFA’s new Human Resources Director, Calvin Thomas.

## **2.0 Master Schedule**

### Major Schedule Changes

The following Gantt chart provides a schedule of the planned initiatives and deliverables for the Modernization program that are in progress.

### 3.0 Summary Of Program Risks & Issues

#### 3.1 Program Risks

Area	Description	Mitigation Strategy	Ability To Control
<b>HIGH SEVERITY</b>			
FMS Oracle Financials	Production Environment needed 6/16/00. IT operations now says it will be ready 7/15/00.	<ul style="list-style-type: none"> <li>Work with IT ops to expedite schedule. Analyzing impact to FMS Schedule.</li> </ul>	Medium
FMS Oracle Financials	Development has not been started. Functional Design documents are behind schedule and will impact the Solution Demo scheduled for June 30 <sup>th</sup> .	<ul style="list-style-type: none"> <li>Development team is working overtime to complete the Functional Design documents so technical approach discussions can proceed with the Development team and the Financial Partners. Involvement from Financial Partners will be to confirm requirements.</li> </ul>	High
Organization Transformation	Delay in organization implementation requested by key SFA sponsors	<ul style="list-style-type: none"> <li>Bring appropriate parties together to reach consensus on scope of Mod Partner contract and develop alternative solutions if necessary</li> </ul>	

### 3.2 Program Issues

Area	Issues	Proposed Solution
Common Origination and Disbursement Phase II	Need to acquire SFA LAN Access	<ul style="list-style-type: none"> <li>• 6/2 – Have approval from Ken Dineen to procure server and one PC to begin process of attaching to LAN.</li> <li>• 5/26 – Have gone ahead and asked Manisha Patel to price PCs and Server. Will house PC acting as server outside VDC. Will consider this resolved when we have actually setup PCs.</li> <li>• Talk w/ Carol Seifert 5/23 to solicit her input/ preference</li> </ul>
Common Origination and Disbursement Phase II	Need to obtain approval for use of CaseWise Software	<ul style="list-style-type: none"> <li>• 6/2 - Received e-mail from Wayne, cc to Carol Seifert for approval to use tool. Need Wayne Wright's approval to use tool for BPR. Wayne is out until 5/31. Tool is actually part of recommendation made by Giga to SFA, though SFA CIO has not procured it.</li> </ul>
Organization Transformation	New/continued org support for modernization within scope of Modernization Partner contract	<ul style="list-style-type: none"> <li>• Partner with Candace Hardesty to work with Contracting Officers to clarify scope and interpretation of Modernization Partner Contract</li> </ul>
FMS Oracle Financials	Need to determine who will take lead on coordinating/ resolving issues with IT Operations concerning the hardware, software and support services required for FMS	<ul style="list-style-type: none"> <li>• Lead role should be assigned to an SFA CIO staff member. Support to be provided by FMS Tech Arch team. Several examples of this nature exist which consume large amounts of team member time and delay project work</li> </ul>
FPT: FP Core Process Reengineering	Unable to hold workshop with Oversight/Technical Assistance team to discuss recommended solutions within appropriate project timeframe.	<ul style="list-style-type: none"> <li>• AC team will continue to develop recommended solutions document independently and present</li> </ul>

Area	Issues	Proposed Solution
		to Oversight/TA team for review and comment.

## 4.0 Key Accomplishments This Month and Plans For Next Month

During the month, the project teams accomplished the following:

### COMMON ORIGINATION AND DISBURSEMENT (COD)

Work Completed this Month:

- Delivered final Business Case (Phase I) to Carol Seifert 5/8/00
- Finalized Kay's presentation for QA Conference 5/14/00
- Finalized Kay's presentation for MASFAA Conference 5/18/00
- Presented Performance-Based funding high-level design to COD IPT
- Agreed to conduct reviews of the following organizations as potential solution/alliance partners to COD:
  - EDS
  - ACS
  - USA Group
  - Total Systems
  - USAA
- Agreed to do pre-screening interviews of the following potential solution/alliance partners to COD:
  - AFSA
  - Texas State
  - Colorado State
  - PHEAA
  - Sallie Mae
- Finalized staffing of Change Mgt. Team members with Linh Nguyen. Mimi Yeh and Sue Gottlieb will be joining team full time the week of 5 June, after completing existing responsibilities.
- Received approval from Wayne Wright, CIO Architecture, to utilize CASEwise tool for business process definition

Planned Work in Progress:

- Continue to develop detailed workplan under each major TO task
- Schedule site visits with potential solution/alliance partners to COD
- Continue to develop Vendor Review Criteria (Technical, Financial, and Core Values)
- Continue to develop approach for bringing in school representatives to gather focused feedback
- Continue to develop SFA Functional Requirements (Performance-Based funding, Campus-Based program)
- Continue to work on defining institutional record [received overview of current systems (PEPS, AAAD) as background]

Work Projected for next Month:

- Receive Partner approval for COD Phase II Task Order.
- Visit USA Group to give detailed COD presentation (6/12/00)
- Conduct site visits with other potential solution/alliance partners to COD
- Prepare for COD Phase II IPT kick-off meeting (6/13/00)
- Complete sub-contractor forms for new sub-contractors (e.g., Jim Farmer) who will assist in developing COD II requirements

**DIRECT LOAN SERVICING REENGINEERING /  
CRM CALL CENTER IPT /  
CDS RETIREMENT**

Work Completed this Month:

- CDS Business Case finalized -5/09/00
- Reengineering Options finalized- 5/19/00
- Finalized approvals for CDS Retirement Task Order
- Finalized planning for Launch meeting and sub-team kick-off meeting
- Conducted Launch Meeting 5/31/00 kicking off CDS Retirement project
- Developed Sub team charters for Quick Hits, Best Practices and Current Environment
- Staffed Core-Team with cross functional group
- Held focus and planning sessions
- Developed staffing for Sub-teams
- Meet with SFA Subject Matter Experts to review identified requirements for CDS
- Meetings with Dan Hayward and Rosemary Beavers to discuss JADs for CDS

Planned Work in Progress:

- Preparation of Requirements Document for CDS
- No further work for DLSR is planned.
- Gather background information for the call center inventory

Work Projected for next Month:

- The DLSR IPT is concluded as of 5/31/00. Technical implementation work will continue on the CDS Retirement Implementation project.
- Conduct Sub-Team Kick off sessions for CRM Call Center
- Complete Quick Hits recommendations for CRM Call Center
- Begin detailed Call Center Inventory for CRM Call Center
- Begin Best Practices research for CRM Call Center
- Finalization of Requirements Document for CDS
- Preparation of Design Document for CDS
- Meetings on planned designs with SFA personnel for CDS

## FMS ORACLE FINANCIALS

### Work Completed this Month:

- Completed draft Configuration Management approach document.
- Completed draft Development Standards document (including naming conventions).
- Completed draft Security approach document.
- Finalized and turned in security paperwork for all team members.
- Met with IV&V contractor and discussed approach to IV&V work.
- Developed outline and completion method for SFA FMS System Integration Plan.
- Work Plans finalized.
- Met with Dave Elliott to discuss what hardware has been ordered as well as specific configuration and cost. Confirmed IT Operation's intention to order hardware, which is significantly more powerful than FMS' requirements document states as being needed. Additional follow-up and meetings will be required if the Tech Arch team will assume the lead role in resolving this issue.

### Planned Work in Progress:

- Identify issues regarding internet security and Forms 2000 access for the GA community.
- Address support, and hardware configuration and cost issues with IT Operations.
- Research and summarize information on available Oracle training and performance support materials/tools.
- Continue documenting and rolling out the support and control methods for development environments, these include Back Up and Recovery, Configuration Management, Security Approach, and Development Standards.
- Finalize the account code structure with the SFA CFO, ED OCFO, and Financial Partners.
- Complete the initial Functional Design documents for Phase II.
- Conduct technical walk-through of Functional Design documents for Phase II and start coding based on meetings held Monday and Tuesday.
- Continue to complete the development environment set up values (e.g., list of accounts, projects, organizations, and institutes) and correspondingly, setup GL, AP, and Fixed Assets in the VDC instance. Conduct design review meetings with CFO and Financial Partners user groups to validate and conclude design and set up. Current status is:

<b>Application</b>	<b>Percent Complete</b>	<b>ETC</b>
General Ledger	40%	TBD
Accounts Payable	54%	TBD
Accounts Receivable	N/A	TBD
Fixed Assets	57%	TBD

Work Projected for next Month:

- Finalize and roll out the support and control methods for development environments, including Back Up and Recovery, Configuration Management, Security Approach, and Development Standards
- Finalize FMS team responsibility matrix to used for assigning security and access profiles for team members.
- Finalize the account code structure and obtain account code segment values and other application setup information.
- Develop Testing Approach, and Product Test preparation approach.
- Develop Conference Room Pilot approach and introduction package for team orientation.
- Draft FMS Communications Plan.
- Brief SFA FMS IPT Core Team on status of FMS project and specifically update Financial Partners and Students on FMS Plan and schedule.

## FINANCIAL PARTNERS TRANSFORMATION (FPT)

### FP Core Process Reengineering

#### Work Planned for this Month:

- Conduct FP Process Reengineering workshops to review and finalize the current environment document for GA/Lender Payment, Contract Management, and Oversight/Technical Support.
- Package and submit Current Environment Assessment deliverable by 5/15/00.
- Obtain final sign-off of Current Environment Assessment deliverable.
- Develop draft Table of Contents for Reengineering Options and Analysis deliverable.
- Conduct GA/Lender client team workshops to discuss reengineering options and solutions.
- Conduct meeting with GA/Lender team and FMS team to understand connection/overlap.
- Document high level review of FP systems (FFEL/NSLDS).

#### Work Completed this Month:

- Conducted client team workshops to discuss options and potential solutions – Contract Management/Maintenance; GA/Lender Payments; Program Development.
- Obtained final sign-off of Current Environment Assessment deliverable on Tuesday, May 30th.
- Conducted meeting with GA/Lender and FMS teams regarding Form 2000 implementation
- Met with AC CRM team and discussed CRM IPT scope and timeline.

#### Planned Work in Progress:

- Evaluating and researching reengineering options, including potential cost areas, feasibility, and impacts upon processes, technologies, and organization.

#### Work Projected for next Month:

- Conduct GA/Lender reengineering options and solutions workshop
- Conduct best practices/options brainstorming session at FP team lead meeting on Monday, June 5<sup>th</sup>.
- Conduct GA/Lender reengineering options and solutions workshop on Tuesday, June 6<sup>th</sup>.
- Continue evaluation and research activities for options focusing on costs, benefit, and risk analysis.
- Continue development of Reengineering Options and Analysis deliverable.

### **FP Project Management and Facilitation**

#### Work Planned for this Month:

- Prepare and deliver bi-weekly Status Report Packages for Barry Morrow, Linda Hall, direct reports and key stakeholders on 5/12 and 5/26.
- Confirm scope issues for NY Mentor PIN, Policy and Analysis, and Contract Management projects.
- Enhance Status Report Package to include a timeline of key project dates.
- Create a FP divestiture spreadsheet to capture recommendations for resolving FP ownership issues.
- Continue to participate/facilitation FP standing team meetings (e.g., Form 2000, Document/Workflow Management, etc.).
- Steve Shane and Steve Hawald will deliver Modernization Presentation during FP team leads meeting.
- Complete and deliver the Initial Project Management Plan to Barry Morrow by 5/15.
- Obtain review, approval, and sign-off of Initial Project Management Plan deliverable.
- Finalize workplans for the Analysis and Design Phase.
- Schedule FP project management workshops for the month of June.
- Continue to participate/facilitation FP standing team meetings.
- Continue to provide facilitation support for the FP project team leads.
- Complete the monthly status report.
- Update the program scorecard.
- Complete the final draft of the program workplan.
- Update the program management plan.

#### Work Completed this Month:

- Delivered Status Report Packages
- Added program timeline of key project dates to the Status Report Package to address request by Barry Morrow.
- Finalized FP divestiture spreadsheet and confirmed ownership recommendations with FP clients and Greg Woods.
- Provided FP divestiture technical support to Greg Woods during meetings with Frank Holloman.
- Submitted Initial Project Management Plan deliverable on 5/15/00.
- Obtained reviews and approvals of Initial Project Management Plan deliverable.
- Facilitated Modernization Program discussion with Steve Shane and Steve Hawald during FP team leads meeting.
- Finalized workplans for the Analysis and Design Phase.
- Scheduled FP project management workshops for the month of June.
- Continued to provide facilitation support for the FP project team leads.
- Continued to participate/facilitate FP standing team meetings.
- Completed the final draft of the program workplan.
- Updated the program management plan.

#### Planned Work in Progress:

- Confirm scope issues for NY Mentor PIN, Policy and Analysis, and Contract Management projects.
- Finalize workplans for the Analysis and Design Phase.
- Plan FP project management workshops for the month of June.
- Finalize FP divestiture spreadsheet including cost, valuation and recommendations for ownership issues.

Work Projected for next Month:

- Finalize workplans for the Analysis and Design Phase.
- Deliver bi-weekly status Report Packages to Linda Hall, FP Directors, and key stakeholders including CIO and FMS team.
- Finalize FP divestiture issues with Greg Woods and research the methodology used to evaluate the value of financial servicing businesses.
- Obtain review, approval, and sign-off of Interim Project Management Plan deliverable.
- Assist the client in the completion of the Depletion of Federal Reserve Funds Analysis.
- Schedule FP project management workshops for the month of June.
- Continue to provide facilitation support for the FP project team leads.
- Update the program management plan.
- Develop the Conceptual Design template for the project teams.

### **FP Employee Development/Organizational Transformation**

#### Work Planned for this Month:

- Select and develop tool for Change Readiness Survey.
- Develop Facilitation Guide for administration of FP Change Readiness Survey.
- Conduct, document and distribute the results of 4 rounds of visioning sessions with Barry Morrow and Directors.
- Develop FP Communications Strategy.
- Conduct Change Agent Workshop.
- Work with Change Agents to schedule Transformation Overview and Organization Assessment sessions.
- Finalize communications materials.
- Orient the new General Manager to Transformation and FP Strategic Sessions.
- Distribute Transformation Overview communication materials to external FP audiences.
- Conduct best practice research on organizational characteristics of performance-based organizations.

#### Work Completed this Month:

- Conducted second visioning session with Barry and his Directors, confirming the strategic intent for Financial Partners, core competencies, and ways to remove barriers to progress in the transformation.
- Conducted third visioning sessions which resulted in drafting FP's Vision and Mission statements.
- Conducted fourth visioning session with FP Directors and middle-managers. Focused on goal-setting and action-planning to achieve the new FP Vision.
- Determined Change Opportunity Assessment approach which includes administering a survey to all employees within Financial Partners. Key headquarters and regional leads will be leveraged to conduct focus groups to communicate the rationale behind the Assessment, and ensure completion.
- Finalized Organizational Assessment Survey.
- Finalized facilitation guide for administration of FP Organizational Assessment.
- Revised and finalized Organization Assessment and Change Agent materials (Approach, Next Steps, Transformation Overview, Organization Assessment Overview)
- Identified team for Employee Development which includes Directors and regional staff.
- Finalized selection and development of tool for Change Readiness Survey.
- Determined approach for administering Change Readiness survey to FP Channel.
- Changed project name from Employee Transformation to Employee Development.
- Worked with Frank Ramos to determine communication strategy for financial partner community
- Crafted Financial Partners communications for Modernization Partner newsletter.
- Finalized Transformation Overview communications materials for internal and external FP audiences.
- Conducted Change Agent Workshop and kicked off Change Agent Program.
- Worked with Change Agents to schedule Transformation Overview and Organization Assessment sessions
- Finalized vendor agreement to tabulate results from Organization Assessment
- Began orientation discussions with Linda Hall, Acting General Manager
- Discussed challenges and lessons learned of developing Skills Assessment with CIO and SFA U.
- Conducted best practice research on performance-based organizations

Planned Work in Progress:

- All planned work completed

Work Projected for next Month:

- Distribute Transformation Overview communication materials to external FP audiences
- Finalize documentation of FP Transformation transition
- Map FP Transformation projects to Five Year Performance Plan
- Monitor roll-out of Organization Assessment and Change Agent materials
- Develop communications for GA/lender community
- Plan pilot of FP Partner Understanding (strategic intent) within one business unit

## CIO

### Work Completed this Month:

1. Data Warehouse
  - Continued working with CFO organization with quick hit requirement
  - Continued working with the Financial Partner Channel's DW team
  - Continued requirements gathering for Schools ITR and Financial Partner Channels
  - Continued driving NSLDS Cost Analysis deliverable
2. Ombudsman
  - Finalized data conversion and training plans
  - Final Application screens have been developed
  - Developed knowledge base plan for entry of information
3. Intranet
  - Conducted Content management planning effort with business units
  - Continued development and roll out of intranet sections
  - Functional requirements submitted for TO 16 (Technical Architecture Design/Build) & IFAP teams
  - Interwoven product procured
4. Integrated Technical Architecture
  - Design build sessions launched
  - Product Acquisitions Complete
  - Conducted detailed design sessions with product vendors
5. Schools Portal & IFAP Conversion
  - Rolled out collaborative workspace for IFAP/Portals IPT
  - Delivered hardware and software to development sites to mitigate VDC preparation delays
  - Completed preliminary storyboard presentation for School Portals

**Planned Work in Progress:** see Work Projected for Next Month

### Work Projected for next Month:

1. Data Warehouse
  - Continue gathering data warehousing requirements across SFA
  - Continue helping the CFO and Financial Partners with their requirements/planning
  - Complete NSLDS Cost Analysis deliverable
2. Ombudsman
  - Delivery of Data conversion plan
  - Development of system testing plan
  - Finalize VDC Plans

3. Intranet
  - Continue build out of intranet web pages
  - Continue development of SFA Intranet
  
4. Integrated Technical Architecture
  - Complete product interaction designs
  - Deliver TO 16.1.1 - Legacy Systems Inventory Report
  - Deliver TO 16.1.5 - Technical Infrastructure Procurement Report
  
5. Schools Portal and IFAP Conversion
  - Initiate development for Schools Portal and IFAP Systems
  - Complete Schools Portal and IFAP storyboards

## **PROGRAM MANAGEMENT OFFICE**

### **Program Planning & Reporting**

#### Work Completed this Month:

- New reporting processes were executed. Process improvements continue to take place as they are identified.
- Continued managing task orders to completion.

#### Planned Work in Progress:

- Task Order Management process improvements were identified and communicated. Implementation will be evidenced by successful and timely turnaround of in-progress task orders in the first weeks of June.

#### Work Projected for next Month:

- Obtain signoff for Task Order 8.
- Implementation of improvements to Task Order Management process.
- Plan for and conduct formal Client Quality Management Assessment (CQMA).
- Conduct formal review for CMM Level II compliance of PMO processes.
- Integration with CIO status reporting process. Implement process improvements as needed.
- Deliver Program Management Services Summary for months of April and May.

---

### Partner Management

#### Work Completed this Month:

- Delivered the Legacy Contract Transition Plan.
- Submitted 9 Task Order proposals:
  - TO 7 R1- Business Planning Support (Revision 1)
  - TO 11 Mod 1 R1 - Ombudsman Solution Delivery (Revision 1)
  - TO 13 WO 2 - RFMS
  - TO 13 WO 3 R1 - FAFSA Usability (Revision 1)
  - TO 14 - FMS Phase II
  - TO 16 - Integrated Technical Architecture Design/Build
  - TO 17 - CDS Design
  - TO 18 - SFA Security Development
  - TO 23 - Financial Partners Functional and Technical Support
- Attended the Quarterly Contractor Executive Meeting. Provided meeting support and draft minutes to host organization, SFA Acquisition and Contract Management.
- Completed Security documentation on 43 individuals.

#### Planned Work in Progress:

- Continued effort to complete the acceptance of the Legacy Contract Transition Plan.
- Supported development of the CDS Retirement contracting approach.
- Continued to support to the development of performance based SOWs for future contracts/modifications (CBMD, NSLDS, PEPS).
- Continued effort to complete in progress Task Order proposals.
- Continued effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form - 180 of 190 complete.
- Continued negotiation efforts with subcontractors - 12 signed, 4 in final stages, 10 in progress.
- Continued planning efforts for move to new site (370 L'Enfant Plaza).

#### Work Projected for next Month:

- Complete acceptance of the Legacy Contract Transition Plan.
- Continue to support development of the CDS Retirement contracting approach.
- Submit remainder of in progress Task Order proposals.
- Continue effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form.
- Continue negotiation efforts with subcontractors.
- Continue planning efforts for move to new site (370 L'Enfant Plaza).

## **ORGANIZATION TRANSFORMATION**

### Work Completed this Month:

- Completed critical PDs and KSAs for SFA University
- Completed presentation materials for Schools Transformation All Hands Meeting
- Completed process manual and business flow diagram for Contracting and Acquisitions
- Designed and scoped task orders requested by Anne Teresa for SFA University Modernization and SFA Front to Back Training
- Designed and scoped task order requested by Candy Kane for HR Modernization Support
- Developed potential ideas for an HR 90 Day Plan for new HR Director
- Designed and scoped task for requested by Karen Freeman for Communications Modernization Support

### Planned Work in Progress:

- Facilitate start-up of pending Task Orders: SFA University Modernization, HR Modernization, SFA Front to Back Training, Communications Modernization Support

### Work Projected for next Month:

- Begin HR Modernization work as requested by Candy Kane and Calvin Thomas, and as documented in pending Task Order and Statement of Objectives
- Begin work on SFA University modernization as requested by Anne Teresa and as documented in pending Task Order and Statement of Objectives
- Begin work on SFA Front to Back Process Training as requested by Anne Teresa and documented in pending Task Order and Statement of Objectives
- Begin work on Communications Modernization Support as requested by Karen Freeman and documented in pending Task Order and Statement of Objectives

## **5.0 Appendix: Deliverables Log**

Attached are deliverables logs which indicate the status of the deliverable as In Progress, Delivered, or Accepted.

## **6.0 Appendix: Modernization Program Scorecards**

The following scorecards provide summary status of each of the critical program management areas. The Modernization Program Summary Scorecard is an aggregate assessment of program performance. The scorecard was developed by conducting an assessment of individual projects within the Modernization Program: Common Origination and Disbursement, Direct Loan Servicing Reengineering, Financial Management Systems Design, Financial Partners Transformation, and CIO. Arrows are used to represent the trend of the element as compared to the previous month's scorecard.