

STUDENT FINANCIAL ASSISTANCE

MODERNIZATION PARTNER

PROGRAM SCORECARDS

STATUS AS OF MAY 26, 2000

Management Council Meeting

June 2, 2000

MODERNIZATION PARTNER PROGRAM SUMMARY

| Measure | Common Origination Disbursement (COD) | CDS Simplification | Financial Management Systems Design (FMS) | Financial Partners Transformation (FPT) | CIO | CRM Call Center | DLSR | Organization Transformation |
|---|---------------------------------------|--------------------|---|---|----------|-----------------|---------|-----------------------------|
| Overall | Green ⇄ | Green ⇄ | Red ↓ | Green ⇄ | Yellow ↑ | Green ⇄ | Green ⇄ | Green ⇄ |
| Scope | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Schedule Performance Against Work Performed | Green ↑ | Green ⇄ | Red ↓ | Green ↑ | Yellow ↑ | Green ⇄ | Green ⇄ | Green ⇄ |
| Architecture | Green ⇄ | Green ⇄ | Yellow ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Risk | Green ⇄ | Green ↑ | Green ⇄ | Green ⇄ | Yellow ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Quality | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Communication/Change Management | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Yellow ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Human Resources | Yellow ↓ | Green ⇄ | Yellow ↓ | Yellow ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |
| Commercial Off the Shelf Software (COTS) | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ | Green ⇄ |

COMMON ORIGINATION AND DISBURSEMENT

| Assessment | Trend | Measure | Comments |
|------------|-------|--|---|
| Green | ↔ | Overall | The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization. |
| Green | ↔ | Scope | The TO scope has been defined and agreed to by the schools channel and Modernization Partner. |
| Green | ↑ | Schedule Performance Against Work Performed | Adjusted target end dates were incorporated into final Task Order. All work currently on track. |
| Green | ↔ | Architecture | The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes. |
| Green | ↔ | Risk | Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined. |
| Green | ↔ | Quality | The Project is in the process of developing a documented quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order. |
| Green | ↔ | Communication/Change Management | Have brought two people on board and one part-time management assistant. |
| Yellow | ↓ | Human Resources | Human resource needs have been documented and approved but not yet made available. Project team is still in need of technical manager and support staff. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | A review of COTS products has been incorporated into the project's work plan. |

CDS SIMPLIFICATION

| Assessment | Trend | Measure | Comments |
|------------|-------|--|---|
| Green | ↔ | Overall | The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization. |
| Green | ↔ | Scope | The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner. |
| Green | ↔ | Schedule Performance Against Work Performed | The work within this project is on schedule. JAD sessions are taking place. |
| Green | ↔ | Architecture | The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes. |
| Green | ↑ | Risk | Funding issues have been resolved. |
| Green | ↔ | Quality | The Project has developed a quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order. |
| Green | ↔ | Communication/Change Management | Communication strategies have been incorporated as part of the project's future work plan. A plan for reporting findings has been submitted and requires additional content development. |
| Green | ↔ | Human Resources | Key personnel from the Direct Loan project in Maryland are also working on Mod Partner Program initiatives (CDS Platform project). This was an area of concern for the Direct Loan project management; however, SFA has resolved the issue. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | A review of COTS products has been incorporated into the project's work plan. |

FINANCIAL MANAGEMENT SYSTEM DESIGN (FMS)

| Assessment | Trend | Measure | Comments |
|------------|-------|--|--|
| Red | ↓ | Overall | Persistent issues exist in obtaining adequate access to a stable development environment for the team to progress at the expected rate. The team continues to be short in number and skills. A stable and mature production environment is not available. |
| Green | ↔ | Scope | The scope of Phase 2 is defined in the Implementation Plan. The end state is defined in the FMS Design. An FMS System Integration Plan that describes the transition from Phase 2 to the end state is in process. |
| Red | ↓ | Schedule Performance Against Work Performed | The combination of hardware, IDs, LAN access, software, etc. required for team members to use development and project administration tools has not been provided for all key team members. Potential new requirements for access continue to be raised. Patches may have been inappropriately applied or excluded in the initial application installation. IT Services has not provided specific information regarding the components, costs, and schedule for data center support for production. |
| Yellow | ↔ | Architecture | The project is in full compliance with Modernization Blueprint baseline. The project has not defined any architecture changes; however, IT Management and IT Services have indicated that other products and standards may be required for VDC support and that the team must support those products and standards. |
| Green | ↔ | Risk | The SFA and Modernization Partner project managers confer daily and report in writing weekly to the Steering Committee and the PMO. |
| Green | ↔ | Quality | The IV&V contractor is developing a project plan that will integrate with the project schedule. An SQA Plan has been developed and submitted for approval. CQMA reviews are on schedule. Team quality reviews of all documents and program development are included in the Project Work Plan. |
| Green | ↔ | Communication/Change Management | Communication and change management strategies have been incorporated as part of the FMS project. The FMS project efforts are coordinated with a separate CFO Transformation task. |
| Yellow | ↓ | Human Resources | Modernization Partner team was at full strength, but has lost 2 members. The SFA team remains under strength. The team as a whole lacks sufficient deep skills in development for the Oracle Federal Financials product. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | Oracle Federal Financials product has been purchased. |

FINANCIAL PARTNERS TRANSFORMATION

| Assessment | Trend | Measure | Comments |
|------------|-------|---|---|
| Green | ↔ | Overall | The project is on schedule and project start-up activities are complete. |
| Green | ↔ | Scope | The scope of the Financial Partners Transformation program and Modernization Partner support have been defined and agreed to by all parties. |
| Green | ↑ | Schedule Performance Against Work Performed | The project is on schedule in achieving milestones. Two deliverables were submitted and approved by the FP leadership team. |
| Green | ↔ | Architecture | There will be an assessment of architectures. |
| Green | ↔ | Risk | Project risks to successfully execute the Task Order of work have been documented. Mitigation strategies need to be defined and executed. |
| Green | ↔ | Quality | The project is complying with the requirements of the program plan, appropriate to the work required by the Task Order. |
| Green | ↔ | Communication/Change Management | Communication and change management strategies have been incorporated as part of the project's current and future work plan. |
| Yellow | ↔ | Human Resources | Human resource needs have been documented, approved, and made available. Three replacement resources are expected by June 12 to support task order 10. Additional resource needs have been identified for task order 23 and remain outstanding. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | N/A |

CIO

| Assessment | Trend | Measure | Comments |
|------------|-------|---|--|
| Yellow | ↑ | Overall | The schedule for the IFAP and School Portals projects have been impacted due to inability to procure and deliver required hardware for development efforts to begin. Improvement trend due to Mod Partner arrangements to establish development environment at developer location by 5/31. |
| Green | ↔ | Scope | The scope management effort in the Portals environment is an area of challenge. The scope of the Schools Portal continues to be refined by the Schools channel and the CIO development team. The SFA Intranet project is progressing, but because the Intranet provides information across each SFA organization entity, clear plans by each area for content and design are still being captured and finalized. |
| Yellow | ↑ | Schedule Performance Against Work Performed | The Schools Portal and IFAP re-platform have been impacted by acquisition, installation and configuration of Hardware at the VDC. A mitigation plan has been implemented by the Mod Partner, installing hardware and software at the developer's sights to keep as close to the schedule as possible. |
| Green | ↔ | Architecture | The Project defines the Modernization Blueprint baseline or target architecture standards. The School portal and SFA Intranet Release 2 are being built on the accepted enterprise architecture standards. The content management process to support these solutions is also being built using the enterprise architecture standard. |
| Yellow | ↔ | Risk | Project risks to successfully execute the Schools Portal and IFAP re-platform have been documented and mitigation strategies are currently being defined and will be executed. The key risk area is the commitment of a date to the Schools community in combination with decisions regarding continued procurement delaying the planned schedule for hardware and software acquisition. |
| Green | ↔ | Quality | The project is complying with the requirements of the program plan, appropriate to the work required by the Task Orders. |
| Yellow | ↔ | Communication/Change Management | Communication and change management strategies have been incorporated as part of the project's current and future work plan. |
| Green | ↔ | Human Resources | Human resource needs for the projects are known and the projects are appropriately staffed. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | The project has developed recommendations on the use of COTS products. |

CRM CALL CENTER

| Assessment | Trend | Measure | Comments |
|------------|-------|---|---|
| Green | ↔ | Overall | The project is on schedule and project start-up activities are complete. |
| Green | ↔ | Scope | The scope of the has been defined and agreed to by all parties. |
| Green | ↔ | Schedule Performance Against Work Performed | The project is on schedule. The kick off occurred on 5/31. |
| Green | ↔ | Architecture | There has not yet been an assessment of architectures, as the project is in initial stages. |
| Green | ↔ | Risk | The task order is in process for CRM Call Center. |
| Green | ↔ | Quality | The project is in the process of developing a documented Quality Plan and is complying with the requirements of the Quality Plan. |
| Green | ↔ | Communication/Change Management | The project charter was developed in a collaborative approach with the core team. The project launch and sub-team kickoffs took place at the end of May. Participation included all affected channels in SFA as well as legacy contractors. |
| Green | ↔ | Human Resources | The project team has the individual and group skills needed for the current phase. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | A review COTS software and best-in-business practices has been incorporated into the project's workplan. |

DIRECT LOAN SERVICING REENGINEERING

| Assessment | Trend | Measure | Comments |
|------------|-------|---|--|
| Green | ↔ | Overall | The project was on schedule and has been completed. |
| Green | ↔ | Scope | The scope was defined and agreed to by all parties. |
| Green | ↔ | Schedule Performance Against Work Performed | The project was on schedule and has been completed. |
| Green | ↔ | Architecture | There will not be an assessment of architectures. |
| Green | ↔ | Risk | Project risks to successfully execute the Task Order of work have been documented. |
| Green | ↔ | Quality | The project was complying with the requirements of the program plan, appropriate to the work required by the Task Order. |
| Green | ↔ | Communication/Change Management | Communication and change management strategies were incorporated as part of the project's work plan. |
| Green | ↔ | Human Resources | Human resource needs were documented, approved, and made available. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | N/A |

ORGANIZATION TRANSFORMATION

| Assessment | Trend | Measure | Comments |
|------------|-------|---|---|
| Green | ↔ | Overall | Organization Transformation is completing final project deliverables and anticipates closing/ending the Task Order in the short term. |
| Green | ↔ | Scope | The scope was designed and agreed upon by all parties. |
| Green | ↔ | Schedule Performance Against Work Performed | The project is on schedule. |
| Green | ↔ | Architecture | The project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes. |
| Green | ↔ | Risk | Risks to a successful execution of the Task Order have been documented, and mitigation strategies have been defined. |
| Green | ↔ | Quality | The project is in the process of developing a documented Quality Plan and is complying with the requirements of the Quality Plan. |
| Green | ↔ | Communication/Change Management | The team has facilitated community focus groups to determine the needs and expectations of the customers as well as worked closely with the Organization Transformation team dedicated to the Schools Channel in the early stages of the project. Additionally, the team has worked with SFA leadership to communicate project goals with the Education community via conference presentations and the Updated Modernization Blueprint. |
| Green | ↔ | Human Resources | Human resource needs have been documented, approved, and available. Project team has the individual and group skills needed. |
| Green | ↔ | Commercial Off the Shelf Software (COTS) | The project has developed recommendations on the use of COTS products. |