

**SFA MODERNIZATION  
PARTNER PROJECT**

**CONTRACT STATUS REPORT  
(Monthly)**

***12/1/99 - 12/31/99***

**Activity Summary (Month ending 12/31/99)**

Planned Activities	Results
<b><i>PMO (Dave Gordon)</i></b>	
<ul style="list-style-type: none"> <li>• Continue implementation and run of program processes communications, quality, issues, performance, and SFA support</li> <li>• Distribute Issues Database to Modernization Team</li> <li>• Meet with PSG to discuss possible AC role in current performance management work</li>   <li>• Meet project teams, FAO and FMS and complete monthly scorecards</li> <li>• Complete follow-up for industry benchmarks summary deliverable.</li> <li>• Provide contractors with revised list of SFA development &amp; IRB projects based on status (i.e. “cancel”, “done”, etc.).</li> <li>• Finalize list of SFA business and enabling capabilities and describe each.</li> <li>• Draft descriptions and write-ups for recommended program initiatives based on input from contractors.</li> <li>• Finalize capability framework.</li> <li>• Draft capability—outcome matrix to outline the capabilities mapped to outcome and program initiatives.</li> <li>• Continue implementation and run of program processes communications, quality, issues, SFA support, performance management – within the FMS and DLSR teams</li> <li>• Complete Monthly Program Report Deliverable</li>   <li>• Complete design of Modernization ‘War Room’</li> </ul>	<ul style="list-style-type: none"> <li>• Implementation of processes is on track. We are planning to step up our efforts with regard to implementing Quality plan week ending 12/17</li>   <li>• Testing complete and documentation complete, Lotus Note to Modernization Team with doc link to database will be distributed Monday 12/6/99</li> <li>• PSG was not able to meet 12/2. However, we were able observe PSG design lab for performance framework/scorecard on 12/1. Met with Cindy Reynolds on 12/2 to discuss measurement of IRB and Program performance, as well as multiple performance management initiatives that are starting up and she agreed we need to get together and determine how best to proceed to develop a performance management framework capitalizing on the synergies of the different efforts.</li> <li>• Met with project teams, and completed monthly scorecards.</li>   <li>• Delivered final version of industry benchmarks on 11/29.</li> <li>• Distributed reports to contractors on 11/30.</li>   <li>• Finalized SFA capabilities and provided descriptions.</li> <li>• Completed initiative write-ups based on contractors’ review.</li>   <li>• Finalized 3-tiered capability framework.</li> <li>• Drafted benefits/outcome summary matrix listing capabilities, outcomes mapped to initiatives.</li>   <li>• Continue implementation and run of program processes communications, quality, issues, performance, and SFA support</li>   <li>• Completed Monthly Program Report Deliverable and submitted it to Carol Seifert <ul style="list-style-type: none"> <li>- Met with project teams, FAO and FMS and complete monthly scorecards</li> </ul> </li> <li>• Completed Design of Modernization ‘War Room’</li> </ul>

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Planned Activities	Results
<ul style="list-style-type: none"> <li>• Finalize initial capability release plan by Wednesday, 12/8 and develop plans for distribution and review. Complete mapping of requirements of Blueprint, CSTF and other sources of requirements to the recommended initiatives</li> <li>• Meet with Cindy Reynolds to discuss initial performance management plan</li> <li>• Distribute preliminary Issues Database for use by Modernization Team</li> <li>• Meet with PSG to discuss possible AC role in current performance management work</li> <li>• Schedule and conduct follow up meeting with remaining system owners for Quick Hits/Industry Benchmarks deliverable</li> <li>• Finalize AC best practices capability framework mapping to SFA business processes</li> <li>• Finalize requirements/projects mapping matrix.</li> <li>• Make final revisions of detailed capability release plan on Monday, 12/13.</li>   <li>• Provide to contractors a final report mapping projects to initiatives.</li> <li>• Review initial capability release plan with enterprise architecture (EA) team on 12/14.</li> <li>• Completed design of war room</li> <li>• Complete November Program Monthly Report</li> <li>• Complete review of matured IRB process with the DSG</li> <li>• Review Performance Management Framework with Director of Analysis team</li> <li>• Review the Quick Hits/Industry Benchmarks document with remaining system owners</li> <li>• Deliver Capability Release Plan on 12/17/99</li>   <li>• Initiate ITR activities with Financial Partners channel</li> <li>• Review IRB expanded process, procedures, ranking guidelines with Steve Hawald and prepare for IRB meeting on 1/6/00.</li> <li>• Provide to contractors a final report mapping projects to initiatives.</li> <li>• Review the Quick Hits/Industry Benchmarks document with remaining system owners</li> </ul>	<ul style="list-style-type: none"> <li>• Finalized initial capability release plan and submitted to the Management Council team members on Friday, 12/10 per outcome of MC meeting on 12/9. Requirements mapping continues and estimated to be completed on 12/12.</li>   <li>• Met Cindy Reynolds regarding Performance Management and set up weekly meeting to present our Performance Management framework.</li> <li>• Distributed Issues Database to Modernization Team</li>   <li>• Schedule meeting with PSG to discuss possible AC role in current performance management work</li>   <li>• Scheduled 2 review meetings with remaining systems owners. No SFA system owners attended the meetings.</li>   <li>• Finalized capability framework.</li>   <li>• Completed requirements and projects mapping for all recommended initiatives in the matrix.</li> <li>• Finalized and packaged the Capability Release Plan (version 1.0) deliverable. <ul style="list-style-type: none"> <li>- Met with Organization Design team to understand how the Capability Release Plan impacts their efforts.</li> </ul> </li> <li>• Distributed final reports to contractors on 12/16.</li>   <li>• Met with Organization design team to discuss financial partners channel plans, issues, requirements, etc.</li> <li>• Completed War Room design</li> <li>• Submitted Monthly Program Report on December 9</li>   <li>• Reviewed IRB process and scoring framework with DSG</li>   <li>• Reviewed Performance Management Framework with Cindi Reynolds.</li>   <li>• Scheduled 2 review sessions, however no SFA system owners attended the meetings.</li>   <li>• Delivered to Carol Seifert on 12/17/99. Also delivered copies to each Business Unit – Jean Van Vlandren, Kay Jacks, Barry Morrow, Linda Paulsen and Steve Hawald</li> <li>• Chris Ward met with Barry Morrow to discuss requirement and plans for 1q 2000.</li> <li>• Performed review and have worked with the DSG and Pat Bradfield to complete preparations for 1/6/00 IRB meeting.</li>   <li>• Met with Organization Design team to understand how the Capability Release Plan impacts their efforts.</li> <li>• Scheduled 2 Quick Hits/Industry Benchmarks review sessions, however no</li> </ul>

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	SFA system owners attended the meetings. Quick Hits/Industry Benchmarks agenda item requested to be removed from IRB agenda by Jean VanVlandren.
<b><i>Financial Aid Reengineering (Karl Augenstein)</i></b>	
<ul style="list-style-type: none"> <li>• Hold SFA Best Practices/Lessons learned meeting</li> <li>• Receive draft current environment flows and descriptions for remaining DL systems (CPS, DLSS)</li> <li>• Set dates for first focus group meetings</li> <li>• Hold Schools Focus Group meeting on Weds, 12/8</li> <li>• Begin development of communication plan</li> <li>• Complete documenting current systems</li> <li>• Begin gathering suggestions and recommendations from SFA staff</li> <li>• Hold contractor forums to solicit ideas for systems and process improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Completed</li> <li>• Received first draft of CPS, CDS and DLSS. ACS will rework DLSS and CDS to bring to a higher level. First pass was too detailed.</li> <li>• Date established for Schools Focus Group</li> <li>• Completed. 27 Financial Aid Officers participated.</li> <li>• On hold, pending final agreement on workplan</li> <li>• Received first drafts from EDS, NCS, ACS. In process of reviewing and making corrections – efforts led by SFA managers</li> <li>• In process</li> <li>• Received ideas from EDS and ACS on improvements to existing systems and processes as well as new “out-of-the-box” ideas</li> <li>• Identified CDS retirement as a potential quick hit</li> </ul>
<b><i>Enterprise Engineering &amp; Integration (J. Michael Lee)</i></b>	
<ul style="list-style-type: none"> <li>• Facilitated Enterprise Architecture Management Kick-Off</li> <li>• Facilitated STC Client Vendor meeting</li> <li>• Conducted working session with Andersen Consulting messaging middleware (STC) subject matter experts. Reviewed messaging integration approach &amp; constraints</li> <li>• Started development of interface inventory on existing (legacy, client/server &amp; web centric) environment</li> <li>• Facilitated conference call with Vitria (EAI product class). Initial contact intended to provide vendor project background &amp; integration challenges</li> <li>• Set up EAI (Enterprise Application Integration) vendor meetings with Template, IBM, MSI Solutions</li> <li>• Meeting with Access American lead, Charlie Coleman, to discuss integration architecture (EAI) solution &amp; approach. Discussed potential benefits to Access America Phase II by leveraging an EAI architecture</li> <li>• Conducted Internet architecture Q/A session Andersen Consulting SME</li> <li>• Meet with NewTek/Domain to discuss dependencies between their Intranet project and TO4’s Internet architecture work</li> </ul>	<ul style="list-style-type: none"> <li>• Collected list of client contacts to follow-up with – sectioned by architecture types (Internet, Intergration, Data Warehouse)</li> <li>• Communicated product class &amp; how it maps to the Hairball intergration issue</li> <li>• Message &amp; Integration Broker solutions are well suited to address data &amp; application integration patterns – at a tactical and strategic level</li> <li>• Interface inventory (number and types of interfaces) will be utilized to determine number/amount of adapters required to systematically integrate exist applications</li> <li>• Scheduled vendor meeting for 12/7, 10am at SFA.</li> <li>• Template office visit 12/13</li> <li>• IBM 12/8. 10am. Location TBD. MSI Solutions will be finalized 12/3</li> <li>• Discussed current Access America environment. Will meet with technical team from Access America next week to determine existing issues, risks &amp; interface development status</li> <li>• Findings &amp; feedback will be incorporated into architecture recommendation</li> <li>• Minutes &amp; preliminary findings delivered to Denise Hill for her review. Modernization Partner will work with NewTek/Domain on finalizing workplan, milestones &amp; synchronize effort in order to deliver SFA’s Intranet 1<sup>st</sup> release. Project staffing model, roles &amp; responsibilities to be reviewed by Denise Hill</li> <li>• All ITRs contacted. Meeting with Victoria Edwards (IPOS director in Schools</li> </ul>

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<ul style="list-style-type: none"> <li>• Contact ITRs for CIO, CFO, Schools, Students, and FI's/Partners to focus outreach activities on specific, high-priority initiatives.</li> <li>• Contacted BEA and Netscape to schedule a meeting next week with us and Denise Hill, to discuss application server and web server products.</li> <li>• Held initial vendor meetings with Business Objects, MicroStrategy, and Cognos</li> <li>• Completed product evaluation criteria</li> <li>• Assembled ETL vendor short list and am in the process of arranging meetings</li> <li>• Continue working on CM&amp;S 2<sup>nd</sup> draft deliverable (reviewing &amp; annotating per M. Lee direction).</li> <li>• Submit segments of CM&amp;S 2<sup>nd</sup> draft to M. Lee for comments</li> <li>• Update 1<sup>st</sup> draft of System Integration &amp; Testing Approach with M. Lee comments</li> </ul>	<ul style="list-style-type: none"> <li>channel) to be scheduled by D. Marr for 12/8; CFO ITR provided no info, so will contact Linda Paulsen directly; other contacts being initiated.</li> <li>• Specific dates being selected.</li> <li>• Developed Data Warehousing – End-User access vendor short list</li> <li>• Will be delivered to Denise Hill for her review</li> <li>• Continuing. Work progressing. SME support requested.</li> <li>• Completed. Comments received. Update in progress.</li> <li>• Not completed. Review comments not received at present.</li> </ul>
<ul style="list-style-type: none"> <li>• Communicated &amp; publish vendor meeting schedule &amp; logistics to project team and SFA</li> <li>• Met with Access America Technical team</li> <li>• Met with Keith Wilson and Andy Boots to discuss CIO priority of transitioning from TIVWAN to an Internet-based (Extranet) solution</li> <li>• Met with Jay Long to discuss PEPS architecture.</li> <li>• Developed &amp; presented preliminary short list of vendors to CIO for the three architectures</li> <li>• Met with Denise Hill to preview Intranet project &amp; next steps on SFA Communications requirements (GUI Designs)</li> <li>• Facilitated Netscape meeting to discuss App Server, Web Server, and Portal products and services.</li> <li>• Met with BEA to discuss App Server product</li> <li>• Met with Karen Freeman, Denise Hill, and NewTek/Domain 12/9 to discuss Intranet content and technical architecture standards</li> <li>• Reviewed vendor &amp; product selection criteria with Denise Hill's</li> </ul>	<ul style="list-style-type: none"> <li>• Need to improve on communicating schedules &amp; feedback from meetings</li> <li>• Access America Technical &amp; Business leaders are very positive, interested and motivated in utilizing the integration architecture services. Further meetings will be scheduled to identify &amp; scope additional benefits</li> <li>• Gathered desired information on this initiative for further analysis. Shared information on our architecture work.</li> <li>• Obtained desired information (PEPS not a high CIO priority, but it is one of Barry Morrow's top priorities).</li> <li>• CIO &amp; his management staff provided positive feedback on vendors &amp; tools short list</li> <li>• Meeting went well &amp; was successful in meeting objectives</li> <li>• Meeting conducted 12/9, and was attended by Denise Hill, Jim Green, Pavlick, Sobiloff, Hannan, and Lee.</li> <li>• No SFA staff attended. May need to reschedule.</li> <li>• Karen Freeman's expectations were clearly exceeded, and considers the initiative one of her top priorities.</li> <li>• On Going</li> </ul>

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<ul style="list-style-type: none"> <li>• Met with David Elliot to review &amp; discuss Operation Architecture improvement opportunities</li> <li>• Facilitated Vitria Vendor Meeting – Integration Architecture product</li> <li>• Met with CSC (Beryl Hosack) to discuss key points on contracted deliverable &amp; Security Architecture staffing</li> <li>• Facilitated following Data Warehouse Vendor demos: MicroStrategy, BusinessObjects, Cognos. CIO has requested that Oracle’s OLAP product be evaluated. Meetings will be scheduled to bring them in</li> <li>• Completed Data Warehouse focus group kickoff</li> <li>• Participated on Oracle product presentation – requested by CIO</li> <li>• Met with Cindy Aldridge and the FMS team including Oracle Financials representatives. To introduce Data Warehouse &amp; Integration Architecture</li> <li>• In the process of arranging a DW SME for 12/13</li> <li>• Set up bimonthly meetings with DW client group</li> <li>• Facilitate SFA Critical Methods &amp; Standards outline and approach review</li> <li>• Build the 1<sup>st</sup> draft of Deployment Approach and submit to M. Lee for review.</li> </ul>	<ul style="list-style-type: none"> <li>• David provide sw/hw inventory of exiting operations architecture. David will not provide contractor system documentation – due to disclosure risk. This is a risk we need to mitigate going forward. We need to review certain documentation in order to provide improvement options</li> <li>• Documented meeting minutes &amp; will publish Monday (12/13)</li> <li>• Beryl to supply credentials on security work.</li> <li>• Scheduling conflicts continue with SFA staff. We will go forward with meetings and potentially bring some vendors back for additional demo in January.</li> <li>• Kick off went well. There seems to be a lot of interest in DW, and the group of interested parties.</li> <li>• Will consider Oracle’s Data Warehouse solution</li> <li>• Good initial meeting – other will be necessary to assure that the correct technical architecture decisions are made. Technical architecture teams will provide guidance</li> <li>• Mohit Sahgal is local and is a SME</li> <li>• Completed</li> <li>• Completed review with Connie Davis and Denise Hill. Discussion anchored by Andersen SME, Mark Kindig.</li> <li>• Work continuing. Scheduled for delivery to M. Lee by COB 12/10/99.</li> </ul>
<ul style="list-style-type: none"> <li>• Finalized Integration Architecture (EAI) Communications meeting (Sounding Board Group)</li> <li>• Finalized System Integration &amp; Testing Approach 1<sup>st</sup> &amp; 2<sup>nd</sup> drafts</li> <li>• Revised Configuration Management Approach based on feedback from SFA and submit to Connie Davis for review</li> <li>• Provided technical integration support (SME) to CDS re-engineering team</li> <li>• Completed 1<sup>st</sup> draft of architecture recommendation deliverable</li> <li>➤ Include technology services &amp; product recommendation</li> <li>➤ Identify standards</li> <li>• Facilitated MSI product demo (EAI product class)</li> <li>• Participate in Education Conference in San Antonio</li> </ul>	<ul style="list-style-type: none"> <li>• Deliver concepts &amp; benefits of EAI to “sounding board” &amp; communicate status.</li> <li>• Submitted for internal review.</li> <li>• Completed 12/13.</li> <li>• Continued support scheduled for next week</li> <li>• Final deliverable due 1/7/00.</li> <li>• Meeting minutes are being created and distributed</li> </ul>

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<ul style="list-style-type: none"> <li>• Scheduled Internet Sounding Board Meeting</li> <li>• Re-scheduled BEA Meeting</li> <li>• Re-scheduled IBM Meeting</li> <li>• Finalized Internet Architecture Profiles</li> <li>• Facilitated Data Warehouse vendor meetings with MicroStrategy, Cognos, BusinessObjects and Cognos. Met with Oracle for their Express product.</li> <li>• Completed 1<sup>st</sup> phase of Data Warehouse Quality Assurance</li> <li>• Met with CSC &amp; HPTi to discuss roles, responsibilities &amp; deliverables</li> <li>• Met with GAO – reviewed current architecture policies, standards &amp; expectations</li> <li>• Confirm staffing availability of Michael Santarcangelo &amp; John Clark to assist in Security piece of 4.1.3 Deliverable</li> <li>• Develop 1<sup>st</sup> Draft of Technology Guiding Principles</li> </ul>	<ul style="list-style-type: none"> <li>• To be held 12/20 from 9-10 am</li> <li>• To be held 12/20 from 10-noon</li> <li>• To be held 12/21 from 10-noon</li> <li>• Internet profiles mapped to SFA Web vision &amp; requirements</li> <li>• Majority of the Data Warehousing sounding board couldn't attend due to scheduling conflicts with concurrent Texas meeting.</li> <li>• Mohit Sahgal , a Data Warehouse SME (Subject Matter Expert) will deliver findings &amp; recommendations</li> <li>• Solid understanding &amp; agreement on scope &amp; expectations</li> <li>• GAO explained process by which they judge the progress and completeness of the project</li> <li>• Unable to confirm availability of either individual. Have repeatedly attempted to contact them over 2 days</li> <li>• Pending internal review</li> </ul>
<ul style="list-style-type: none"> <li>• Continue work on “Recommended Technical Architectures” deliverables – due 1/7/2000</li> <li>• Met with MSI Technical Director (Wayne Haber) in Chicago to discuss architecture &amp; services concerns (12/29)</li> <li>• Revised “Technical &amp; Investments Improvements” deliverables</li> <li>• Review CIO submitted “IT Strategic Plan”</li> <li>• Review Rational Rose development product suite for compliance with Internet, EAI, &amp; Data Warehouse Architecture compatibility</li> </ul>	<ul style="list-style-type: none"> <li>• Deliverable will be submitted on 1/7/00 – as scheduled</li> <li>• Discussed architecture &amp; implementation issues. Product is a point-to-point integration solution with minimal support to XML, CORBA, Java, and overall component based architectures. Solution/Product has a very weak development architecture and no workflow management capabilities. Detail findings will be published with final recommendation deliverable (1/7)</li> <li>• Revised document will be re-submitted to Denise Hill for final review on 1/5</li> <li>• Review &amp; recommendations in-progress</li> <li>• Additional meetings with Rational Rose Technical representatives will be required to finalize findings &amp; recommendations. Working with Jim Green to work out logistics</li> </ul>

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Planned Activities	Results
<b>Partner Management (Mike Swain)</b>	
<ul style="list-style-type: none"> <li>• Participate in Procurement Planning Taskforce Workshop meeting to review Mgt Council presentation draft and first draft of Preliminary Business Analyses.</li> <li>• 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.</li> <li>• Submit the Contract Management Plan deliverable</li> <li>• Submit the Partnership Management Plan deliverable</li> <li>• Continue planning for relocation to SFA (Room 4520) and Portals</li> <li>• Continue negotiation efforts with subcontractors</li> <li>• Participate in Procurement Planning Task Force Workshop meeting 12/9/99 to review current status with significant Task Force players.</li> <li>• Initiate planning for Procurement Planning Contractor Workshop proposed for 12/14/99.</li> <li>• 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.</li> <li>• Continue planning for relocation to SFA (Room 4520) and Portals</li> <li>• Continue negotiation efforts with subcontractors</li> <li>• Submit Monthly Contract <b>Status Report</b></li> <li>• Participate in Acquisition Planning Contractor Workshop meeting to discuss Acquisition Planning goals and approach.</li> <li>• Continue to develop the Contract Transition Preliminary Business Analyses</li> <li>• Initiate development of the Acquisition Strategy Update deliverable</li> <li>• 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.</li> <li>• Relocate some 17th St staff to SFA (Room 4520)</li> <li>• Continue planning for relocation to Portals</li> </ul>	<ul style="list-style-type: none"> <li>• Participated in 12/2/99 meeting. Presented first results of Preliminary Preliminary Business Analysis.</li> <li>• Effort continues – New staff added, 93% complete of active staff. Will continue effort for 100% active and ad hoc staff.</li> <li>• Submitted and Accepted.</li> <li>• Submitted</li> <li>• Planning continues</li> <li>• Efforts continue</li> <li>• Participated in 12/9/99 meeting.</li> <li>• Planning initiated and support provided</li> <li>• Effort continues</li> <li>• Planning continues</li> <li>• Efforts continue</li> <li>• Submitted</li> <li>• Participated in 12/14/99 meeting.</li> <li>• Development Continues</li> <li>• Development Initiated</li> <li>• Effort continues</li> </ul>

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<ul style="list-style-type: none"> <li>• Continue negotiation efforts with subcontractors</li> <li>• Continue to develop the Contract Transition Preliminary Business Analyses</li> <li>• Finalize development of the Acquisition Strategy Update deliverable</li> <li>• 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.</li> <li>• Continue planning for relocation to Portals</li> <li>• Continue negotiation efforts with subcontractors</li> </ul>	<ul style="list-style-type: none"> <li>• Staff relocated</li> <li>• Planning continues</li> <li>• Efforts continue</li> </ul>
<p><i>Transformation (Linh Nguyen)</i></p>	

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<ul style="list-style-type: none"> <li>• Participated in Aid Awareness design sessions in Students</li> <li>• Developed newsletter to communicate outcomes from Schools Management Offsite.</li> <li>• Revised organizational approval package for Financial Partners. Assisted Barry Morrow in employee outreach.</li> <li>• Began drafting PDs for non-Deputy CIO positions within CIO Organization.</li> <li>• Developed strawmodel for best-in-business CFO business capabilities.</li> <li>• Finalized HR best practices presentation for discussion with Greg Woods and Candy Kane.</li> <li>• Finalized organizational model/vision for Communications.</li> <li>• Presented performance management best practices to Cyndi Reynolds. Finalized Performance Management PD.</li> <li>• Developed first draft of PBO Foundations 1 training.</li> <li>• Conducted Internal Communicators Workshop with CIO Internal Communicators</li> <li>• Developed draft report of Common Origination Listening Session in San Antonio, Dec. 13-14</li> <li>• Prepared “next steps” presentation to Kay Jacks for Schools organization implementation</li> <li>• Submitted draft CIO senior manager PDs to Tom Pestka for review</li> <li>• Conducted planning meeting with Bob Knisely regarding organization design &amp; implementation for Analysis Group</li> <li>• Attended all-hands meeting for the Program Development team within Analysis</li> <li>• Attended all-hands meeting for CIO staff</li> <li>• Updated SFA organization chart to reflect most up-to-date organizational approval information</li> <li>• Conducted meeting with John Mondragon &amp; Gina Pearson to outline principles, issues, and concerns around the prospect of using a employee skills documentation tool for Wave 2 organization design</li> </ul>	<ul style="list-style-type: none"> <li>• Documented working session notes for Aid Awareness</li> <li>• Facilitated off-site and developed Schools newsletter</li> <li>• Revised Financial Partners organizational approval package</li> <li>• First draft CIO PDs submitted for review</li> <li>• Strawmodel completed. Meeting with Linda Paulsen scheduled.</li> <li>• Presentation with Greg &amp; Candy scheduled for Jan. 10.</li> <li>• Completed Communications vision document</li> <li>• Performance management best practices documentation</li> <li>• First draft of PBO Foundations 1 completed</li> <li>• CIO Internal Communicators Workshop completed</li> <li>• Development Continues</li> <li>• Development Continues. 12/28/99 request to delay delivery until SFA Capability Release Plan updates have been incorporated</li> <li>• Effort continues</li> <li>• Planning continues</li> <li>• Efforts continue</li> <li>• Draft session notes and report of San Antonio Common Origination Listening Session</li> <li>• Documented next steps for Schools organizational implementation</li> <li>• Draft PDs for GS-15 positions within CIO Organization</li> <li>• Meeting notes around confirmed scope and mission of the Analysis Group</li> <li>• Employee comments &amp; issues documented</li> <li>• Employee comments &amp; issues documented</li> <li>• Updated SFA Org Chart submitted for Karen Freeman, Director of Communications for distribution</li> <li>• Documented principles, issues, and concerns</li> </ul>
<b>FMS (Cindy Aldridge)</b>	
See Attached FMS Document	

## SFA MODERNIZATION PARTNER PROJECT

### Plans (Month ending 1/31/00)

#### Planned Activities

##### *PMO (Dave Gordon)*

- Continue implementation and run of program processes communications, quality, issues, SFA support, performance management – within the FMS and FAO teams
- Complete Monthly Program Report Deliverable
- Complete plans and estimates to put the Program on the Internet
- Complete design of Modernization ‘War Room’
- Review draft of initial capability release plan on Monday, 12/6.
- Finalize initial capability release plan by Wednesday, 12/8.
- Determine new target delivery date for initial capability release plan
- Continue implementation and run of program processes communications, quality, issues, SFA support, performance management – within the FMS and FAO teams
- Complete plans and estimates to put the Program on the Internet
- Finalize review plans for capability release plan
- Deliver the Capability Release Plan (version 1.0) to SFA on Monday, 12/20.
  - Meet with Barry Morrow to discuss the requirements and 1<sup>st</sup> quarter 2000 plans for the Financial Partners channel.
  - Confirm plans for January 2000 efforts associated with the review and completion of the Capability Release Plan (version 2.0)
  - Begin reviews of Capability Release Plan with General Managers
- Review matured IRB process with Steve Hawald, also address plans for upcoming IRB meeting (scheduled 1/6/00)
- Review options for completing Quick Hits/Industry Benchmarks with Carol Seifert
- Participate in IRB meeting on 1/6/00
- Confirm plans for January 2000 efforts associated with the review and completion of the Capability Release Plan (version 2.0)

##### *Financial Aid Reengineering (Karl Augenstein)*

- Hold Schools Focus Group meeting on Weds, 12/8
- Begin development of communication plan
- Complete documenting current systems
- Begin gathering suggestions and recommendations from SFA staff
- Document and distribute findings from the focus group session
- Reschedule best practices seminar #1
- Schedule speakers for best practices forums
- Review as-is environment
- Begin documenting reengineering options
- Begin conceptual model
- Add scheduled resources to project team for conceptual model and technical review tasks

##### *Enterprise Engineering & Integration (J. Michael Lee)*

- Communicate/publish vendor meeting schedule & logistics to project team and SFA
- Continue software vendors meetings for all three architectures
- Meet with Access America Technical team
- Develop product evaluation criteria for Netcentric products (major layers only), and obtain Denise Hill signoff
- Schedule client outreach meetings; obtain list of highest priority initiatives; sell our architecture approach
- Meet with David E. to discuss his improvement ideas & recommendations
- Meet with Beryl (CSC) to discuss Architectural Analysis Deliverable
- Bring CSC resources on project
- Continue working on Critical Methods and Standards 2<sup>nd</sup> draft/Final Deliverable.
- Work with BI Methodology SME to drill down Final CM&S deliverable.
- Receive M. Lee comments on System Integration & Testing Approach 1<sup>st</sup> Draft and begin building 2<sup>nd</sup> draft
- Begin 1<sup>st</sup> draft of Deployment Approach

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### Planned Activities

- Obtain specific qualifications for previous Internet architecture implementation that KPMG/AC have done
- Define high-priority services that each major architectural component provides, based on the priority matrix
- Map each high-priority project to one of the 9 profiles (3 per architecture)
- Continue client outreach meetings; complete list of each channel's highest priority initiatives; sell our architecture approach
- Reschedule IBM Websphere & BEA
- Denise Hill – Review Intranet workplan & development team mix (NewTeck, Doamin, KPMG, Andersen Consulting)
- Finalize Security Staffing
- Meet with CSC & HPTI to discuss progress/status
- Review HP improvement opportunities & determine value of content
- Continue working with BI Methodology SME to finalize (edit final) CM&S deliverable for submission to S. Petchon (for review)
- Build 2<sup>nd</sup> draft build of System Integration & Testing Approach and submit to M. Lee for review
- Complete initial draft of Integration Architecture final delivery
  - Include product recommendation
  - Identify standards
- Complete draft of Integration executive summary deck
- Attend MSI Solutions vendor meeting
- Participate in Education Conference in San Antonio Wed-Fri
- Publish all meeting minutes and vendor findings
- Facilitate EAI communications kick-off meeting
- Participate in Development Architecture meeting with CIO & IT Management team
- Facilitate MSI vendor meeting with Steve Hawald & CIO Management team
- Continue work on second iteration of final architecture deliverables
- Continue with technical architecture support to CDS re-engineering team
- Facilitate EAI communications meeting with SFA Sounding Board
- Conduct BEA application server meeting
- Conduct IBM application server meeting
- Publish all meeting minutes and vendor findings
- Schedule Internet security vendor meetings
- Build 1<sup>st</sup> draft of Deployment Approach
- Finalize & submit 'Proposed Technical & Investment Management Improvements' deliverable
- Begin work on Design Standards & Compliance Objects
- Facilitate internal technical Q/A by Andersen Consulting Global Technologies Services partner
- Schedule ETL Vendors (Informatica, Oracle, ETI)
- Begin workplan/task order tasks
- Submit deliverable # 4.1.2 "Recommended Application Architecture Standards version 1"
- Facilitate & initiate "Security Architecture" deliverable work effort
- Publish all vendor meeting minutes, slides, and recommendations
- Start work effort on defining application/technical standards
- Continue work on "COE & Security Standards" deliverables

### ***Partner Management (Mike Swain)***

- Participate in Procurement Planning Task Force Workshop meeting 12/9/99 to review current status with significant Task Force players.
- Initiate planning for Procurement Planning Contractor Workshop proposed for 12/14/99.
- 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 planning for relocation to SFA (Room 4520) and Portals
- Continue negotiation efforts with subcontractors
- Participate in Acquisition Planning Contractor Workshop meeting to discuss Acquisition Planning goals and approach.
- Continue to develop the Contract Transition Preliminary Business Analyses
- Initiate development of the Acquisition Strategy Update deliverable

**SFA MODERNIZATION  
PARTNER PROJECT**

**Planned Activities**

- 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.
- Relocate some 17<sup>th</sup> St staff to SFA (Room 4520)
- Continue planning for relocation to Portals
- Continue to develop the Contract Transition Preliminary Business Analyses
- Finalize development of the Acquisition Strategy Update deliverable

***Transformation (Linh Nguyen)***

- Conduct working session with Bob Knisely and Analysis Group
- Conduct working session with Tom Petska and CIO Group
- Conduct working session with Linda Paulsen and CFO Group
- Review CIO PDs with Tom Petska
- The majority of the OT team will be out on vacation and training the week of 12/27-31
- Finalize the San Antonio Common Origination Listening Session notes/report
- Define basic relationship maps/governance models for core process areas such as Contract & Acquisition Management, Financial Management, IT management
- Gather best practices and proposed methodologies for employee skills inventory/assessment
- Continue to develop CIO senior manager PDs

***FMS (Cindy Aldridge)***

See Attached FMS Document

## SFA MODERNIZATION PARTNER PROJECT

### Deliverables (All)

Deliverable	Status	Contract Delivery Date	Actual Delivery Date	Required SFA Response Date
1.1.1	Accepted	10/6/99	10/6/99	10/20/99
3.1.1a	Accepted	10/8/99	11/2/99	11/16/99
1.1.2	Accepted	10/15/99	10/15/99	10/29/99
1.1.3	Accepted	10/15/99	10/15/99	10/29/99
1.1.3	Accepted	10/18/99	10/18/99	N/A
3.1.3a	Accepted	10/26/99	12/3/99	12/17/99
2.1.2	Accepted	11/1/99	11/1/99	11/15/99
2.1.3a	Accepted	11/1/99	11/2/99	11/15/99
2.4.2a	See Note 2	11/1/99		11/15/99
2.3.4a	Accepted	11/1/99	11/2/99	11/15/99
3.1.1b	Accepted	11/1/99	12/3/99	12/17/99
2.1.1	Delivered	11/15/99	11/15/99	11/29/99
2.1.3b	Delivered	11/29/99	12/20/99	1/7/00
2.1.3c	Accepted	11/29/99	12/10/99	N/A
2.2.2	Accepted	11/29/99	11/23/99	12/7/99
2.4.2b	See Note 2	11/29/99		12/13/99
2.4.2c	See Note 2	11/29/99		12/13/99
2.4.2d	See Note 2	11/29/99		12/13/99
2.4.1	See Note 2	11/29/99		12/13/99
2.3.4b	Accepted	11/29/99	11/29/99	12/13/99
2.3.4c	Accepted	11/29/99	12/10/99	N/A
2.3.2	Delivered	11/30/99	11/29/99	12/15/99
3.1.1c		11/30/99		1/18/00
4.1.1		12/22/99		1/5/00
2.1.3d		12/29/99		N/A
2.2.3	Delivered	12/29/99	12/28/99	1/11/00
2.2.4	Delivered	12/29/99	12/22/99	1/5/00
2.3.4d		12/29/99		N/A
3.1.1d		12/30/99		2/17/00
2.3.1		12/31/99		1/15/00
4.1.2		1/7/00		1/21/00
2.3.3	Started	1/10/00		1/24/00
4.1.3		1/17/00		1/31/00

**SFA MODERNIZATION  
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2.1.3e	Modernization Partner Program Management (Status Report)		1/31/00		N/A
2.2.5	Deployment Approach	Started	1/31/00		2/14/00
2.3.4e	Monthly Contract Status Report		1/31/00		N/A
3.1.1e	Ongoing Project Management and Analysis (Monthly Report)		1/31/00		3/17/00
4.1.4	Architecture Release Plan		2/1/00		2/15/00
3.1.3b	Financial Management System Design		2/3/00		3/13/00
4.1.5	Application & Technical Architecture Stds.		2/16/00		3/1/00
4.1.6	Modernization Blueprint		2/16/00		3/1/00
2.1.3f	Modernization Partner Program Management (Status Report)		2/28/00		N/A
2.2.6	Post-Deployment Maintenance Approach	Started	2/28/00		3/13/00
2.3.4f	Monthly Contract Status Report		2/28/00		N/A
3.1.1f	Ongoing Project Management and Analysis (Monthly Report)		2/28/00		4/17/00
3.1.3c	Financial Analysis & Business Case		3/6/00		4/14/00
3.1.2	License Pricing Analysis		3/9/00		4/21/00
3.1.1g	Project Completion (Final Report)		3/14/00		4/28/00
4.1.7	Recommended Application Architecture Stds. Version 2		3/16/00		3/30/00
2.1.3g	Modernization Partner Program Management (Status Report)		3/30/00		N/A
2.3.4g	Monthly Contract Status Report		3/30/00		N/A
4.1.8	Incentive Fee				

<b>KEY</b>		
<b>Task Order 1 – Effective Date 16 Sept 1999</b>	<b>Task Order 2 - Effective Date 1 Oct 1999</b>	<b>Task Order 3 - Effective Date 1 Oct 1999</b>
1.1 = Task Order 1 - Program Mgmt Office	2.1 = Task Order 2 - Program Mgmt Office	3.1 = Task Order 3 - Financial Mgmt
	2.2 = Task Order 2 - Enterprise Engineering & Integration	
	2.4 = Task Order 2 - Financial Aid Origination	
	2.3 = Task Order 2 - Partner Mgmt	

**NOTES:**

2. Financial Aid Origination Re-engineering (TO2) – Scope being re-examined.

**SFA MODERNIZATION  
PARTNER PROJECT**

**Schedule of Key Meetings (month ending 12/31/99)**

Key Meeting	Date
NewTech – review potential work overlap & provide recommendation	12/1/99
EAI (STC) vendor & SME meeting	12/1/99
1:30-3 Weekly COTR Meeting	12/1/99
Denise Hill – detail walkthrough of Internet, Integration, Data Warehouse architectures, standards & governance	12/2/99
Follow up HP meeting – discuss status quick hits improvement opportunities & HP services	12/2/99
9-11 Procurement Planning Task Force Meeting	12/2/99
1 3:30p Weekly Organ.-Kane	12/6/99
1:00-2:00 - Core team meeting	12/6/99
First Focus Group meetings (students and schools)	12/6/99
10a IT-IRB	12/7/99
11a Internal Communicators	12/7/99
8:30-9a Weekly COO-Steve	12/8/99
1:00p Weekly Organ.-Kane	12/8/99
1:30-3 Weekly Mod COTR	12/8/99
Mgmt Council	12/9/99
Focus Group-DLSR	12/9/99
1-2p Core Team-DLSR	12/13/99
3:30p Weekly Organ.-Kane	12/13/99
10a IT- IRB	12/14/99
11a Internal Communicators	12/14/99
8:30-9a Weekly COO-Steve	12/15/99
1:00p Weekly Organ.-Kane	12/15/99
1:30-3 Weekly Mod COTR	12/15/99
Mgmt Council	12/16/99
Best Practices-DLSR	12/20/99
3:30p Weekly Organ.-Kane	12/20/99
10a NCS-DLSR	12/21/99
10a IT-IRB	12/21/99
11a Internal Communicators	12/21/99
8:30-9a Weekly COO-Steve	12/22/99
10a EDS-DLSR	12/22/99
1p ACS-DLSR	12/22/99
1:00p Weekly Organ.-Kane	12/22/99
1:30-3 Weekly Mod COTR	12/22/99
Mgmt Council	12/23/99
3:30p Weekly Organ.-Kane	12/27/99
10a IT-IRB	12/28/99
11a Internal Communicators	12/28/99
1p Mgmt Council	12/28/99
8:30-9a Weekly COO-Steve	12/29/99
1:00p Weekly Organ.-Kane	12/29/99
1:30-3 Weekly Mod COTR	12/29/99
Mgmt Council	12/30/99

**SFA MODERNIZATION  
PARTNER PROJECT**

**Overall Project Schedule**  
(See Microsoft Project Gantt Chart)

**SFA MODERNIZATION  
PARTNER PROJECT**

**Personnel Status**

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**SFA MODERNIZATION  
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**SFA MODERNIZATION  
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