

SFA Financial Transformation Program Biweekly Status Report Package

Period ending June 23, 2000

I. Status Provided

Status Provided	Projects	Team Lead	Comments
	Financial Partners Process Reengineering		
	GA/Lender Payment Process	Frank Ramos	
	Oversight and Technical Assistance	Ann Marie Cimino	
	Policy and Analysis	Ron Streets	
	Contract Management	Anna Allen	
	Financial Partners Process Reengineering		
✓	Enhanced Ptr. Relationship Mgmt. (CRM)	Linda Stoddard	
	Voluntary Flexible Agreements	Cameron Ishaq	
	Regulatory Process Improvements	Jack Reynolds	
	Default Reduction Incentives	Jack Reynolds	
	Enhanced Monitoring of Financial Partners	Katrina Turner	
	Enabling Technology for Financial Partners		
N/A	Web Portals for Financial Partners	Mike Duffin	Project start date is Jan 2001
	Common Third Party Interfacing	Jack Reynolds	
✓	Imaging/Document Management	Courtland Smith	
✓	Data Warehouse for Financial Partners	Courtland Smith	
	Employee Development		
✓	Employee Development	Linda Hall	
	Enhanced Service Delivery for FP		
✓	Expanded FAFSA to Trading Ptr. Websites	Calvin Whitaker	
✓	Pilot Electronic Certification	Calvin Whitaker	
	E-Commerce Data Exchange (Form 2000)	Frank Ramos	

II. Program Highlights

III. Program Summary

- Accomplishments/Results
- Plans for the Period

IV. Issues Log Summary

V. Schedule of Key Meetings

VI. Program Progress Tracking Report

SFA Financial Transformation Program Biweekly Status Report Package

Period ending June 23, 2000

II. Program Highlights

FP Core Process Reengineering - Reengineering Options and Analysis

The FP Core Process Reengineering team is in the second stage of the reengineering effort. Several workshops were conducted with process owner teams to brainstorm and confirm reengineering options and solutions. The Reengineering Options and Analysis deliverable summarizes the opportunities identified by each of the FP teams and documents solutions by best practice area - financial transactions/cash management, performance management, customer relationship management, knowledge management, and contract management. The Reengineering Options and Analysis deliverable will be submitted to Linda Hall, FP Directors, and SFA reengineering team members on Friday, June 30th for review.

FP Project Management and Facilitation

The FP Project Management Facilitation team is in the process of completing the Interim Project Management Plan. This plan makes several updates to the Initial Project Management Plan to reflect the activities started under Task Order 23. The plan also introduces the tools that will be utilized through the Conceptual Design phases of each project. The deliverable will be submitted to Linda Hall, FP Directors, and SFA reengineering team members on Friday, June 30th and will undergo a review and approval process.

FP Organizational Assessment

The FP Organizational Assessment effort is currently on hold by the Union. Linda Hall plans to meet with the LMPC in July to address the Union concerns and attempt to resolve the issue. The Change Agents will be keeping FP employees informed about the status of the Organizational Assessment.

**SFA Financial Transformation Program
Biweekly Status Report Package**
Period ending June 23, 2000

III. Program Summary

Accomplishments and Results	Plans for the Next Period
Financial Partners Transformation Program	
<ul style="list-style-type: none"> • Established communication channel with eCAD members • Conducted Oversight and Technical Assistance. Reengineering Solutions workshop and gained input from team. • Gathered documentation and began discussions around LEAP/SLEAP. • Continued evaluation and research of reengineering options and solutions focusing on cost information and best practices. • Continued development of communication plan to include modernization partner, project milestones, utilization of current vehicles (e.g. INSTEP), and coverage of FP projects. 	<ul style="list-style-type: none"> • Finalize Reengineering Options and Analysis deliverable. • Complete draft of the Interim Project Management Plan. • Update the FP workplan to reflect Task Order 23 items. • Schedule Next Steps for Visioning activities. • Meet with project Team Leads to identify key communications for Communications Plan. • Post transformation communications to GA/Lender website.
GA / Lender Payment Process	
<ul style="list-style-type: none"> • No Status Report 	<ul style="list-style-type: none"> •
Oversight and Technical Assistance	
<ul style="list-style-type: none"> • No Status Report 	<ul style="list-style-type: none"> •
Policy and Analysis	
<ul style="list-style-type: none"> • No Status Report 	<ul style="list-style-type: none"> •
Contract Management	
<ul style="list-style-type: none"> • No Status Report 	<ul style="list-style-type: none"> •
Enhanced Partner Relationship Management (CRM)	
<ul style="list-style-type: none"> • Conducted a brainstorming session where six major ideas were generated. • Met and discussed new ideas and team communication. • Met with a few Lenders during the CLFE meeting on 6/13 and discussed the group ideas to date. 	<ul style="list-style-type: none"> • Obtain Names of GA representatives to serve on a focus group from Kristi Hansen. • Schedule next meeting for early July.
Voluntary Flexible Agreements	
<ul style="list-style-type: none"> • Kick-off meeting organization and agenda set; materials identified for collection into binder format by 7/1/00. 	<ul style="list-style-type: none"> • All team activities suspended until 7/1/00.

**SFA Financial Transformation Program
Biweekly Status Report Package**
Period ending June 23, 2000

III. Program Summary (continued)

Accomplishments and Results	Plans for the Next Period
Regulatory Process Improvements	
<ul style="list-style-type: none"> No Status Report 	
Default Reduction Incentives	
<ul style="list-style-type: none"> No Status Report 	
Enhanced Monitoring of Financial Partners	
<ul style="list-style-type: none"> No Status Report 	<ul style="list-style-type: none">
Web Portals for Financial Partners	
<ul style="list-style-type: none"> Project Start Date is Jan. 2001. 	
Common Third Party (Middleware)	
<ul style="list-style-type: none"> No Status Report 	
Imaging / Document Management	
<ul style="list-style-type: none"> Provided status update (6/14). Team Lead status meeting cancelled (6/21). Discuss status and upcoming activities. Workplan needs to be revised. Reviewed matrix document. Implemented modification to matrix document. Gathered GM requirements. Conducted weekly meeting. Presented deliverable template to team. Provided status on matrix document. Outlined upcoming activities and requirements. 	<ul style="list-style-type: none"> Conduct Weekly Imaging/Document Management Meeting. Meet with the facilitator/technical lead. Distribute Draft Document to team. Complete Imaging Document Management matrix. Assign Tasks.
Data Warehouse for Financial Partners	
<ul style="list-style-type: none"> No Status Report 	<ul style="list-style-type: none">
Employee Development	
<ul style="list-style-type: none"> Administered Organizational Assessment. Developed Draft Communication Plan. Performed Best Practice Research. 	<ul style="list-style-type: none"> Work with Union to continue Organizational Assessment. Coordinate communications with resources. Continue Research efforts.

**SFA Financial Transformation Program
Biweekly Status Report Package**
Period ending June 23, 2000

III. Program Summary (continued)

Accomplishments and Results	Plans for the Next Period
Expanded FAFSA to Trading Partners	
<ul style="list-style-type: none"> • Standard weekly touchpoint meeting. • Initiative scope defined. • Gathering more information on direction of IPT. • Reviewed Project Management approach. 	<ul style="list-style-type: none"> • Conduct kick-off meeting. • Attend next IPT meeting on Expanding FAFSA. • Determine scope, timeframes, and deliverables for this initiative. • Identify new team members. • Complete Team Charter.
Pilot Electronic Certification	
<ul style="list-style-type: none"> • Standard weekly touchpoint meeting. • Reviewed Project Management Approach. • Complete Current Environment Assessment. • Pilot participants selection still being determined. • Core Team Members confirmed. • Team Charter completed. • Copy of P-Note obtained. 	<ul style="list-style-type: none"> • Complete selection of pilot participants. • Complete revised Team Charter. • Meet with Andy Boots on his Promissory Note proposal. • Obtain current process documentation from pilot participants. • Conduct team meeting. • Identify pilot participants.
E-commerce Data Exchange (Form 2000)	
<ul style="list-style-type: none"> • No Status Report 	<ul style="list-style-type: none"> •

**SFA Financial Transformation Program
Biweekly Status Report Package**
Period ending June 23, 2000

IV. Issues Log Summary

V.	DATE LOGGED	ISSUE DESCRIPTION	IMPACT	PRIORITY	ASSIGNED TO	STATUS	RESOLVE DATE	ACTION REQ'D/ RESOLUTION
1.	4/19/00	(Enh. Ptr. Relationship Mgt.) Need to identify GA's to be represented on GA focus group based on NCHELP recommendations.	GA focus group progress cannot be made until team is identified.	High	J.Reynolds	Open	6/14	Working with Kristy Hansen to identify GA/ Lenders focus group members.
2.	5/3/00	(Voluntary Flexible Agreements) Unsure of VFA legislation, reporting metrics	Progress cannot be made until VFA legislation is received	High	C. Ishaq	Open	7/7	Revisit VFA legislation and Departmental releases on VFAs to determine metrics (if any). Pending receipt of up-to-date version of written legislation
3.	5/03/00	(Cross-Project) Need to communicate with Partners about FP projects	Lack of communication is resulting in confusion internally and externally about transformation	High	Carrie Smith/ Frank Ramos	Open	6/9	Creation of a two page description of projects and organization of projects to distribute to partners and possibly put on website. Waiting for internal communication to run course before distributing communication to Partners
4.	6/7/00	(Cross-Project) Need to address overlap between initiatives	Multiple requests for information are confusing community and channel members	High	Team Leads	Open	9/31	Teams Leads should attend or send a representative to the Team Leads meeting and to review all coorespondence provided to help identify overlap and resolve resulting issues
5.	6/7/00	(Cross-Project) Need for training on tools	Channel members require training on tools introduced in the Transformation process	Medium	Team Leads/ J.Bos-Beijer	Open	9/31	This issue will be addressed with SFA HR as part of the overall training plan

**SFA Financial Transformation Program
Biweekly Status Report Package**
Period ending June 23, 2000

Issues Log Summary

VI.	DATE LOGGED	ISSUE DESCRIPTION	IMPACT	PRIORITY	ASSIGNED TO	STATUS	RESOLVE DATE	ACTION REQ'D/ RESOLUTION
6.	5/22/00	(Voluntary Flexible Agreements) Work with David Rippon to identify new intern/share intern	Resources – Intern	High	C. Ishaq	Closed	7/7	Possibility of part-time intern
7.	5/22/00	(Voluntary Flexible Agreements) Revise schedule for group rollout	Schedule	High	C. Ishaq	Closed	5/31	Schedule revised
8.	5/11/00	(Contract Management) Current scope definition may be an overlap with Enterprise Solution Team. Need confirmation from GM on the approach to pursue.	Enterprise Solution Team FP Reengineering Team	High	B. Morrow	Closed	5/31	Need confirmation
9.	4/19/00	(Pilot Electronic Certification) Need scope issue resolved and initiative clarification. Issue between PBO and OPE policy on electronic certification.	Initiative may be delayed	High	C. Whitaker B. Morrow	Closed	5/31	Met with Barry and Andy Boots on 04/24. Gathering more information on recent negotiating rule making meeting on electronic certification. Met with Barry and NCHELP to analyze implications of project. Will meet with Policy to gather more information.
10.	4/26/00	(Data Warehouse for FP) Determine the links between the FP and SFA Data Warehouse Funding Request. Need to understand whether the FP request should stand-alone or should it be included in the overall SFA data warehousing initiative.	Funding	High	C. Smith B. Morrow	Closed	5/1	CIO will brief on the data warehousing initiative on 5/01/00. B. Morrow, C. Smith, and CIO met and agreed that data warehousing project will be part of the enterprise-wide IPT.
11.	5/03/00	(Enh. Ptr. Relationship Mgt.) Identify and finalize team structure	Need clarification before project can proceed	High	L. Stoddard A. Cimino	Closed	6/7	Team met while at NCHELP conference. Will meet again to finalize team structure
12.	04/20/00	(Voluntary Flexible Agreements) Declare SFA independence on VFA decisions; detail workflow b/w Dept. and SFA on VFA negotiations.	Independence question	High	C. Ishaq	Suspended	??	Met with Frank Holleman on VFA decisions; detail workflow between Dept. and SFA on VFA negotiations. Independence question – suspended. Detail workflow question – suspended

**SFA Financial Transformation Program
Biweekly Status Report Package**

Period ending June 23, 2000

VII. Schedule of Key Meetings

Program Meetings:	Date:	Time:
Team Lead Meeting	Wed. - 6/27/00	1:00 p.m.
Project Meetings:	Date:	Time:
Risk Modelling	Tues. - 6/27/00	9:30 a.m.
Imaging / Document Management Team Meeting	Tues. – 6/27/00	10:30 a.m.
CRM/Call Center Meeting	Tues – 6/27/00	1:00 p.m.
CIO Touchpoint Meeting	Tues. – 6/27/00	3:00 p.m.
Default Reduction Workshop	Wed. – 6/28/00	2:00 p.m.
Data Warehouse Team Meeting	Thurs. – 6/29/00	10:30 a.m.
Conceptual Design Initial Review Session	Wed. – 7/5/00	3:00 p.m.
Conceptual Design Initial Review Session (2)	Thurs. – 7/6/00	9:00 a.m.
Conceptual Design Initial Review Session (3)	Thurs. – 7/6/00	1:00 p.m.
Conceptual Design Initial Review Session (4)	Fri. – 7/7/00	9:00 a.m.

VI. Program Progress Tracking Report

See attached Program Progress Tracking Report