

## Integration Partner Integration Support & Transition Achievement Report (Deliverable 153.1.1c) February 2004

### **Executive Summary**

Integration Partner supports FSA's leadership and the actions required to drive the development of integration projects and initiatives. This report summarizes Integration Partner's activities for the month of February that support the development of integration projects and initiatives.

Major accomplishments for the month include those accomplishments that support FSA's Business and Technology Integration Group. This support has included the following:

- Continued development of enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities
- Continued management of enterprise integration risks
- Assisted the BTIG in reshaping the group's roles and responsibilities.
- Provided due diligence in support of FSA's Integration recompute effort. Integration Partner provided briefings to potential bidders on the Integration Partner Integration, Integrated Partner Management and Data Strategy initiatives.
- Worked with the BTIG to reshape current enterprise business objectives and draft enterprise design principles.
- Continued to provide support relative to GAO's review of FSA's Systems Integration efforts.

Enterprise gaps that may have an effect on FSA's integration program are summarized on page four. In summary, the gap identified focuses on the need for Integration Partner and FSA to work together to ensure that an appropriate level of enterprise direction and integration is being considered and captured in the Integrated Partner Management Financial Partners Eligibility and Oversight requirements.

### **Overall Value Delivered**

#### Integration Progress

The following synopses outline progress towards major integration initiatives within the Integration Partner program, including Application & Delivery, Enterprise Data Strategy and Integrated Partner Management (IPM).

#### **Application & Delivery**

- Common Origination & Disbursement (COD) Releases 3.0, 3.1 and 4.0 will continue to build upon the existing COD solution that provides FSA with a core, single integrated solution to manage aid originations and disbursements.

- Test efforts are underway for Release 3.0 (2004-2005 annual cycle); implementation is currently scheduled for a March release. Release 3.1 is currently scheduled for a July 2004 implementation; technical designs are currently being finalized.
- Release 4.0 (2005-2006 annual cycle) planning activities were initiated during the month of February.
- The Integration Partner team is also drafting presentations in preparation for FSA's Spring Conference.

### **Enterprise Data Strategy**

- The Enterprise Data Strategy Phase II task order is providing further analysis on the following areas:
  - FFEL / student data enrollment data reporting options
  - Website and portals consolidation options
  - Shared services implementation options
  - Impact of CSB procurement outcome
  - Financial transaction processing options
  - Enterprise analytics support architecture options

The end result of this task order will be a more detailed overall enterprise-wide data framework that integrates the components listed above, as well as a functioning XML management tool and support of an active data quality management process for FSA.

- In coordination with FSA's working groups, completed and submitted the Functional Gaps Analysis and Enterprise Analytics Architecture Options Analysis draft deliverables.
- Reviewed and finalized XML Registry enhancements and requirements for inclusion into the May production release.
- Continued efforts to draft the Data Quality Issue Management Tool reports.

### **Integrated Partner Management**

- The IPM Gaps Analysis task order will seek to address any gaps or remaining aspects within the IPM framework that have yet to be identified, resulting in end-to-end business requirements for an overall IPM solution.
- The IPM Gaps Analysis team continued to develop Financial Partners Oversight and Eligibility As-Is flows and requirements for Non-Case Management Schools.; the associated deliverables were submitted to FSA. Additionally, eCMO requirements continued to be reviewed for alignment with the target state. Client meetings were held to gather requirements for the Financial Partners Eligibility and Oversight Requirements deliverable.
- The eZ-Audit team is currently focused on Releases 1.2 and 2.0. Release 1.2 will be deployed March 8 and will include changes to support the upcoming A-133 audit cycle. Release 2.0 will support fixes to the PEPS interface, school group fixes and other enhancements to the current eZ-Audit. The scope of the eZ-Audit task order has been increased due to requirements review meetings with FSA. This change in scope has

been approved by FSA, and FSA and Integration Partner are working together to modify the current contract.

- The Identity and Access Management Tools Analysis task order will seek to understand how available Identity and Access Management technologies and tools can help achieve FSA business objectives. The task order will enable FSA to explore vendor products and their suitability for addressing FSA requirements.
- During the month of March, the Identity and Access Management team continued to organize the Identity and Access Management product demonstrations for the FSA Security Working Group. Preliminary results of the prototype product selection are being reviewed. Integration Partner recommends that business owner input be solicited for product selection criteria.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status, as well as a Program Scorecard that reflects project variances from the previous reporting month, and is focused on the Task Order, Scope, Schedule, Cost, Quality and Overall variances. Projects are on schedule and have no significant issues. The Enterprise Data Strategy task order must continue to be monitored carefully to ensure there is no schedule slip as a result of the delayed award. Refer to the attached February Bi-Weekly Status Reports, Bi-Weekly Status Report 02-13-04.pdf and Bi-Weekly Status Report 02-27-04.pdf.

#### Participation in FSA Business Integration & Technology Group (BTIG)

The Integration Partner provides business, technical and integration support to FSA's Business Integration and Technology Group. Integration Partner provides this group with the following:

- Vision analysis, facilitation and establishment,
- Coordination and alignment of the Integration Partner program with overall program vision,
- Agenda management and meeting coordination,
- Management of the enterprise sequencing plans, and
- Facilitation of major integration dependencies, risks and issues.

Accomplishments for the month of February have included participation in key integration discussions, continued management of integration risks and enterprise sequencing plans for FSA's various integration projects and initiatives and general BTIG administration. Specific efforts for the month have included the following:

- Assisted the BTIG in reshaping the group's roles and responsibilities.
- Provided due diligence in support of FSA's Integration recompetitiveness effort. Integration Partner provided briefings to potential bidders on the Integration Partner Integration, Integrated Partner Management and Data Strategy initiatives.
- Worked with the BTIG to reshape current enterprise business objectives and draft enterprise design principles.
- Continued to provide support relative to GAO's review of FSA's Systems Integration efforts.



There were no BTIG meetings held for the month of February, as the meeting time continued to be utilized for FSA resources to discuss FSA market research and procurements. Meetings will also be placed on hold for the month of March. It is anticipated that meetings will reconvene during the month of April.

#### Enterprise Risk Management

FSA's BTIG continues to identify integration risks among the key integration initiatives. The enterprise integration risks continue to be reviewed and updated; the most recent risks and associated mitigation plans are still being validated among the business owners. Integration risks will continue to be identified, monitored and escalated to Management Council as needed.

Additionally, Integration Partner project-level risks can be found in the Bi-Weekly Status Reports for the month of February. Refer to the attached February Bi-Weekly Status Reports, Bi-Weekly Status Report 02-13-04.pdf and Bi-Weekly Status Report 02-27-04.pdf.

#### Enterprise Sequencing Plan

Sequencing plans for key integration initiatives must be managed at the program level. Integration Partner maintains the program schedule, the Integrated Master Schedule, which tracks Integration Partner task order start and end dates, major milestones and future projects. Refer to the attached document, Mod Integrated Master Schedule\_022704.pdf, for the current Integration Master Schedule.

Integration Partner also maintains FSA's Integrated FSA Sequencing Plan views, which help to inform planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives. During the month of February, Integration Partner and the BTIG continued to develop an enterprise sequencing plan focused specifically on FSA's key business and technical integration initiatives and critical dependent enterprise activities. Refer to the attached document, FSA BIG Sequencing Plan Integration DRAFT 03052004 v6.xls, for the current enterprise sequencing plan.

#### Enterprise Gaps

The following synopses summarize any enterprise gaps that may have an effect on FSA's integration program.

The Integration Partner Integrated Partner Management team is currently working with FSA's Financial Partners channel to gather requirements for the Financial Partners Eligibility and Oversight Requirements deliverable. Some of the FP subject matter experts are not fully aware of the data strategy target state including aspects of the new vision as it relates to FSA's enterprise goals and objectives. Integration Partner and FSA need to work together to ensure that an appropriate level of enterprise direction and integration is being considered and captured in the requirements.

#### Integration Partner Internal Integration

Integration Partner ensures that key integration projects and initiatives are integrated throughout the program by providing a formal venue for integration leads to meet and share knowledge as it relates to project status, impacts, dependencies and deliverables.

The Integration Partner Data Strategy and IPM teams have been working to strengthen the integration points between the efforts. Also, the Integration Partner Data Strategy, IPM, eZ-Audit and Identity & Access Management teams met for an all-hands meeting to discuss overall goals, objectives and integration points.

#### Integration Efforts Planned for March 2004

The Integration Partner will focus on further developing the following integration areas: Application & Delivery, Data Strategy and Integrated Partner Management.

#### **Application & Delivery**

- COD will continue to move forward with the implementation activities for Releases 3.0. In addition, development activities will continue for Release 3.1. Release 4.0 requirements sessions will proceed.
- Continue to prepare for FSA's Spring Conference.

#### **Enterprise Data Strategy**

- Continue to revise XML Registry design documentation.
- Continue progress on the Data Quality, CSB Impact Analysis, FFEL/Student Enrollment Options, Web Portals/Shared Services and CDA Operating Guidelines efforts.
- Deliver the XML Core Components Dictionary Release 2.0.
- Work with FSA to increase the Data Strategy II scope to include analysis related to additional CPS/ISIR files and identify associated candidate XML schemas.

#### **Integrated Partner Management**

- The IPM Gaps Analysis team will submit the final version of the Financial Partners Oversight and Eligibility As-Is flows deliverables and the requirements for Non-Case Management Schools.
- Integration Partner will continue to work with FSA to modify the eZ-Audit contract to reflect the scope changes related to Release 2.0 of the eZ-Audit solution. In addition, Integration Partner has developed the new work plan to reflect the new scope.
- The Identity and Access Management team will continue efforts to review results of the prototype product selection efforts.

#### **Integration & Transition Support**

- Integration Partner will continue to manage the enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities.
- Integration Partner will continue to manage enterprise integration risks.
- Integration Partner will continue to provide due diligence in support of FSA's Integration recompetit effort, to include transition activities upon the award of the new vendor.



- Integration Partner will continue to work with the BTIG to reshape current enterprise business objectives, in an effort to update FSA's Vision Framework.
- Continued to provide support relative to GAO's review of FSA's Systems Integration efforts.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status for the upcoming weeks. Refer to the attached February Bi-Weekly Status Reports, Bi-Weekly Status Report 02-13-04.pdf and Bi-Weekly Status Report 02-27-04.pdf.