

## Integration Partner Transition Plan (Deliverable 153.1.3 Rev 01)

### **Executive Summary**

The Transition Plan details the approach for the transfer of Integration Partner knowledge and artifacts to FSA and the new Integration Leadership Support Contractor (ILSC). In addition, the plan will document the means of communication between the three parties during the transition period and the processes for issue resolution and progress reporting.

### **Knowledge Transfer Approach**

Integration Partner will work collaboratively with both FSA and the new Integration Leadership Support contractor to ensure a smooth transition of enterprise project and organizational knowledge and processes.

### Project Briefings

The following briefings will provide critical information on key FSA business and technology projects. Accenture and FSA resources will provide briefing content and deliver briefings to the new ILSC for the following projects:

- Data Strategy I and II/Enterprise Data Strategy Vision
- Front End Business Integration (*FSA*)
- Integrated Partner Management
  - PEPS
  - Case Management and Oversight
  - Gaps Analysis
- eZ-Audit
- Enterprise Application Integration
- Integrated Technical Architecture
- Student Aid Internet Gateway
- Financial Management System (*FSA*)
- Security Architecture
- Common Services for Borrowers (*FSA*)
- Central Processing System/FAFSA/PIN/SAIG Participation Management
- Common Origination & Disbursement
- National Student Loan Database System
- eCampus Based System
- Portals
  - Students
  - Schools/IFAP
  - Financial Partners

- FSA Data Marts
- FSA Organization & Integration Overview
  - FSA Goals
  - FSA Organization Overview
  - Key Business and Technical Owners
  - Governance Processes
  - FSA Business Architecture
  - Customers and Partners
  - Integration Artifacts to be Transferred
    - Enterprise Sequencing Plan
    - Enterprise Risk Management
    - Enterprise Design Principles
    - Enterprise Business Objectives
    - Enterprise Vision Framework & Enterprise Business Functions
- XML (FSA)
  - Accenture will transition the maintenance of the XML Repository at the end of the Data Strategy project.

The content for each briefing will include the following:

- Project Overview – High-level description of project.
- Project Owners – Contact information for FSA key personnel and system operator (if applicable).
- Business Functions – Description of business functions supported by the project.
- Relationship to FSA’s Strategic Goals – Project relationship to FSA’s Strategic Goals.
- Relationship to FSA’s Big Picture – Project relationship to FSA’s Enterprise Data Strategy Vision and/or technical/business architecture.
- Delivery Process – Description of the process used for project implementation and deliverable creation.
- Project Schedule – Project development schedule or related annual operational activities.
- Project Deliverables – Key deliverables of the project.
- Next Steps – Description of any next steps required for future phases of work, procurement impacts, etc.

Briefing schedules have been coordinated with FSA and the new ILSC vendor, Grant Thornton. Refer to the Integration Transition workplan, 153.1.3 Transition Plan 05212004.mpp, as well as the complete briefing schedule and associated resources, Integration Partner Transition Briefing Schedule.doc.

### Organization

Understanding the roles, responsibilities, processes and interdependencies associated with FSA's organization is a critical success factor for the new ILSC vendor. A working knowledge of the organizational structure and related governance components will enable the new vendor to communicate effectively to target audiences. Integration Partner and FSA will review the following organizational components with the ILSC vendor:

- FSA Organization
- Key Business and Technical Owners
- Governance Processes: BTIG, Management Council, Annual Planning Activities
- FSA Business Architecture
- Customers & Partners
- Integration Team, BTIG and ILSC Roles & Responsibilities

Refer to the Integration Plan deliverable, 153.1.2 Integration Plan 04302004.doc, for detailed information on the roles and responsibilities of FSA's Integration Team, BTIG and the ILSC, as well as detailed information regarding relationships with the rest of the FSA organization.

### Vision

Understanding FSA's Enterprise vision is another critical success factor for the ILSC vendor. This transfer of knowledge will include a review of FSA's current business architecture, the financial aid delivery lifecycle, and the concepts of FSA's Enterprise Data Strategy Vision. Integration Partner recommends that FSA review how each of these components are/will be impacted by current procurement efforts.

### Risks/Issues

The new ILSC vendor will need to understand the current process for capturing enterprise risks in order to formalize the process moving forward, to include risk identification, monitoring, and escalation. Integration Partner will review the current BTIG risk/issue tracking tools and processes with the new ILSC vendor.

In addition to the enterprise risks noted above, we would also like to characterize the following as FSA enterprise Integration program focused risks and issues:

- FSA resource utilization
- Overall availability of funds and budget for integration program
- Achievement of FSA's Integration goals

We recommend that FSA and the ILSC effectively use FSA resources to maximize their participation in project planning, oversight of integration activities, and risk mitigation discussions. We also recommend that the ILSC and FSA establish checkpoint processes to review major enterprise integration risks, outline mitigation strategies, and resolve outstanding major issues.



### Processes

Integration Partner recommends that FSA review with the new ILSC vendor the organizational processes that surround Department and enterprise planning activities such as budget planning (business cases, OMB 300s) and working groups (AWG, DSG, IPC).

Integration Partner will also review the administration operations performed today to support the efforts of the BTIG.

It will be critical for the new ILSC vendor and FSA to develop and formalize internal integration processes critical to the success of FSA's integration program. This should include

- Developing a process by which enterprise project owners identify and discuss project dependencies, schedule, impacts and risks
- Managing the process
- Ensuring enterprise focus/point of view for related deliverables

The new ILSC will also need to determine with FSA the relationship of the ILSC with FSA's Communications Management Services organization, as well as what level of communication will be required with external groups such as the Department and GAO. This understanding will formalize how enterprise Integration messages are delivered internally and externally.

### Artifact Transfer

Integration Partner will archive the following artifacts in their active format (Word, Excel, and PowerPoint) to a CD-ROM and provide to FSA during the transition period, no later than May 31, 2004:

- FSA Enterprise Sequencing Plan (historical and current versions)
- FSA Business Functions View
- FSA Vision Framework (historical and current versions)
- Enterprise Business Objectives (latest version that Integration Partner has worked with)
- BTIG Meeting Minutes & Presentations
- BTIG Risk/Issue Tracking Tool

Artifact Transfer – There is currently not a configuration management tool or process used to maintain version control of the above artifacts. In addition, the artifacts are continuously in progress, and are updated during annual planning activities. The Enterprise Sequencing Plan and Risks/Issues are updated more frequently. The new ILSC will need to determine standard review and update frequency (monthly, quarterly, etc.).

### Schedules & Plans

Integration Partner manages the sequencing plan for key integration initiatives at an enterprise level through the BTIG. This plan helps 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. Integration Partner will transfer this plan and knowledge on the maintenance of the plan to the new ILSC vendor.

In addition, Integration Partner will recommend additional processes and artifacts for managing enterprise plans and schedules.

### **Communications Approach**

Integration Partner will work with FSA and the new Integration Support Leadership Contract vendor to ensure smooth communications between each party during the transition period. The following activities will enable frequent communication:

- Joint status meetings with FSA, Integration Partner, and the new ILSC vendor as needed
- Knowledge transfer activities with the ISLC vendor (project briefings, task and artifact review, etc.)
- Integration Partner resources will make themselves available as needed for activities deemed appropriate for transition
- Maintaining continuous open lines of communication between the three parties: FSA, Integration Partner and the new ILSC vendor

In addition, Accenture and Grant Thornton principals have planned a one-on-one session to discuss the transition, lessons learned and best practices from the Modernization/Integration Partner program.

### **Issue Resolution Approach**

Issues will be managed through open lines of communication and routine progress reporting. Integration Partner will escalate any issues encountered to the FSA Integration Lead as needed.

### **Progress Reporting**

Integration Partner will provide weekly progress reports to FSA during the transition period via the TO 153 monthly Integration Support & Transition Achievement Report deliverable. Refer to the attached Progress Report template, Transition Progress Report Template.doc.