

Department of Education SFA Transition Workplan

Activity/ Task Number	Activity/Task Description	Status	Deliverable(s)	Start Date	End Date (Intranet)	End Date (FMS)	End Date (IFAP)
	<b>Milestones</b>						
e	LOI signed		Note: The tasks with status <b>AM</b> will be performed by the Applications Management team after they have been maintaining the application for 1-2 months.				
e	Transition Start			7/31/2000			
e	Staffing Start Up			8/15/2000			
e	Contract Effective Date						
e	Transition End			11/15/2000			
<b>1-0</b>	<b>Plan Transition Program</b>						
1-1	Understand Transition Program Expectations	C	Arrangement Letter/Task Order	07/31/00	08/11/00		
	Review Scope of Effort	C	N/A	07/31/00	08/11/00		
	Review Budget (Time/Cost)	C	N/A	07/31/00	08/11/00		
	Deliver Expectations to Transition Team	C	N/A	07/31/00	08/11/00		
1-2	Identify Direct/Indirect Transition Resources	C	N/A	07/31/00	08/11/00		
1-3	Develop Master Transition Workplan	C	Transition Workplan	07/31/00	08/11/00		
	Review/Validate Past Workplan Documentation	C	N/A	08/25/00	09/05/00		
	Utilize Transition Estimate Workplan Tool	C	N/A	08/25/00	09/05/00		
	Update and Finalize Transition Workplan	C	Approved Workplan and Assumption Doc.	09/11/00	09/20/00		
	Secure Approval for Transition Workplan	C	Updated Transition Workplan	09/11/00	09/20/00		
1-4	Review/confirm Transition Exit Criteria/Assump.	C	Transition Exit Criteria Document	09/11/00	09/20/00		
<b>2-0</b>	<b>Mobilize Transition Program</b>						
2-1	Design Initial Transition Team Work Environment	C	N/A	07/31/00	08/04/00		
	Determine Work Location (cubicles, conference rooms)	C	Work Location Secured	07/31/00	08/04/00		
	Secure Workspace Accessories (Printers, copiers, etc.)	C	Workspace Accessories Secured	07/31/00	08/04/00		
	Secure Initial Facilities (Phones, desks, chairs, etc.)	C	Initial Facilities Secured	07/31/00	08/04/00		
2-2	Transition Team Orientation and Start-up Training	C	Product Demo's, BPM Contract Review	07/31/00	09/05/00		
2-3	Obtain and Deploy Resources for Transition Team	C	Transition Resource Added To Team	07/31/00	09/05/00		
	Validate Staffing Requirements for Transition	C	N/A	07/31/00	09/05/00		
	Create Transition Team Contact Sheet	C	Contact Spreadsheet	08/07/00	09/05/00		
2-4	Obtain Resources to Assist Transition	C	N/A	08/14/00	09/05/00		
	Identify/Mobilize Recruiting Support	C	Resource Identified and Communicated	08/14/00	09/05/00		
	Identify/Mobilize HR Support	C	Resource Identified and Communicated	08/14/00	09/05/00		
	Identify/Mobilize Financial Support	C	Resource Identified and Communicated	08/14/00	09/05/00		
	Identify/Mobilize CIO Support	C	Resource Identified and Communicated	08/14/00	09/05/00		
2-5	Establish Partnering Relationships	C	Partners Identified	08/21/00	09/05/00		

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	Identify Partners that will assist in Transition	C	Partners Identified	08/21/00	09/05/00		
	Socialize Scope of effort and Deliverables	C	Partners Understand Expectations/Scope	08/21/00	09/05/00		
<b>3-0</b>	<b>Manage and Improve Transition Program</b>						
3-1	Manage/Direct Program	C	N/A	07/31/00	11/03/00		
3-2	Implement Issues/Risks Log for Transition Team	C	N/A	07/31/00	11/03/00		
	Manage Issue/Risk Log	C	Issue/Risk Log	07/31/00	11/03/00		
	Create Issues/Risks Log	C	N/A	07/31/00	08/25/00		
3-3	Manage Status Reporting Process	C	Weekly Status Reports	07/31/00	11/03/00		
	Create Status Report Template	C	Status Report Template	07/31/00	08/25/00		
	Conduct/Lead Status Meetings	C	Weekly Status Meetings	07/31/00	11/03/00		
	Create Weekly Status Reports	C	Weekly Status Reports	07/31/00	11/03/00		
3-4	Conduct Program Close-out	C	Transition Exit Criteria, KX Contribution, CMA	10/15/00	11/03/00		
	Complete and Communicate KX	C	Updated GSDL	10/15/00	11/03/00		
	Complete Individual Contribution	C	Updated Contribution Summary Worksheets	10/15/00	11/03/00		
	Complete CI Program Worksheet	C	Complete CI Program Worksheet	10/15/00	11/03/00		
	Conduct Final CQMA Review	IP	CQMA Review Completed	10/15/00	11/15/00		
<b>4-0</b>	<b>Plan and Execute Unit Communications</b>						
4-1	Create Unit Communication Plan Framework	C	Communication Plan Framework	08/14/00	09/05/00		
	Suggest/Validate Comm. Delivery Vehicles	C	N/A	08/14/00	09/05/00		
	Setup/Validate Communication	C	N/A	08/14/00	09/05/00		
	Execute Major Components of Comm. Plan	IP		08/14/00	11/15/00		
	Secure Approval for Communication Framework	C	Approved Communication Framework	08/14/00	09/05/00		
4-2	Planning and Facilitating Minor Launch	AM	Pre-Launch Event Plan (Resp./Philosophy)	TBD	TBD		
	Develop Calendar of Events	AM	Calendar of Events Document and Agendas	TBD	TBD		
	Validate Stakeholders	AM	N/A	TBD	TBD		
	Secure Approval for Events	AM	Approved Calendar of Events	TBD	TBD		
	Plan and Facilitate Event Execution	AM	N/A	TBD	TBD		
	Create/Distribute Event Summary Documentation	AM	Event Summary Document	TBD	TBD		
4-3	Planning and Facilitating First Major Launch Event	AM	Launch Event Plan (Resp./Philosophy)	TBD	TBD		
	Develop Launch Event	AM	Launch Event Agenda	TBD	TBD		
	Validate Stakeholders	AM	N/A	TBD	TBD		
	Secure Approval for Event	AM	Approved Launch Event Agenda	TBD	TBD		
	Facilitate Event	AM	N/A	TBD	TBD		
	Create/Distribute Event Summary Documentation	AM	Launch Event Summary Document	TBD	TBD		
<b>5-0</b>	<b>Design and Implement Unit Operations</b>						
5-1	Design Initial BPM Team	C	Facilities/Technology Plan Implemented	08/07/00	09/08/00		

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	Create Initial Role/Responsibilities Descriptions	C	Key Position Staffing Chart (w/R&R)	08/07/00	09/08/00		
	Develop Day 1 Unit Organizational Structure	C	Simple Organizational Chart	08/07/00	09/08/00		
	Secure Approval for Day 1 Unit Org.	C	Approved Organizational Chart	08/07/00	09/08/00		
5-2	Conduct Key Knowledge Transfer Activities	C	N/A	09/01/00	11/01/00		
	Identify Knowledge Transfer Requirements (Bus.)	C	N/A	09/01/00	11/01/00		
	Identify Knowledge Transfer Requirements (Tech.)	C	Requirements Document	09/01/00	11/01/00		
	Create Knowledge Transfer Plan	C	Requirements Document	09/01/00	11/01/00		
	Package Knowledge Transfer Materials	C	N/A	09/01/00	11/01/00		
	Manage Key Knowledge Transfer Activities	C		09/01/00	11/01/00		
	Execute Key Knowledge Transfer Activities	C	N/A	09/01/00	11/01/00		
5-3	Complete Assessment of Operations	IP	Current Operation Documented-Gap Analysis	08/28/00	11/15/00		
	Create Production Readiness Documentation	C	Production Readiness Checklist	08/28/00	09/04/00		
	Secure Approval for Readiness	C	Approved Service Assessment Document	09/04/00	09/08/00		
	Address Major Gaps from Assessment	IP	N/A	09/08/00	11/15/00		
5-4	Identify Expectations of Stakeholders	C	Expectations Matrix	08/28/00	09/22/00		
	Validate Stakeholders	C	N/A	08/28/00	10/12/00		
	Conduct Interviews with Stakeholders	C	N/A	09/04/00	09/08/00		
	Develop/Communicate Expectations Matrix	C	Expectations Matrix	09/11/00	09/15/00		
	Secure Approvals for Matrix	C	Approved Expectation Matrix	09/18/00	09/22/00		
5-5	Provide Underpinning of Services	C	Contingency Plan, Facility Management	09/04/00	10/06/00		
	Validate Current Time Tracking Framework	C	Time Tracking Framework in Place	09/04/00	09/08/00		
	Manage Status Reporting Process	C	Weekly Status Report to PMO	08/04/00	11/03/00		
	Create/Approve Status Report Template	C	Status Report Template	09/25/00	09/29/00		
	Create Contractor Strategy	C	Contractor Strategy	09/25/00	09/29/00		
	Secure Approval for Strategy	C	Approved Contractor Strategy	10/02/00	10/06/00		
	Validate Disaster Recovery Plan	AM	Disaster Recovery Plan	TBD	TBD		
	Perform Risk Assessment	AM	N/A	TBD	TBD		
	Validate Creation of Disaster Recovery Plan	AM	N/A	TBD	TBD		
	Subscribe to Recovery Service	AM	Signed Contract	TBD	TBD		
	Validate Termination Plan	AM	Termination Plan Reviewed and Approved	TBD	TBD		
5-6	Setup Initial Int./Ext. Metrics Frameworks	AM	ISC, BSC, SLA, OLA's - Frameworks	TBD	TBD		
	Create External Scorecard Framework	AM	External Scorecard Framework	TBD	TBD		
	Determine/Validate Quadrants, KPI's, CSF's	AM	N/A	TBD	TBD		
	Determine External Metrics	AM	Top Down Metrics Identification Matrix	TBD	TBD		
	Determine Data Collection Methods	AM	N/A	TBD	TBD		
	Create First Scorecard	AM	Balanced Scorecard	TBD	TBD		
	Determine/Create Reports	AM	Balanced Scorecard Reports	TBD	TBD		
	Create Internal Scorecard Framework	AM	Internal Scorecard Framework	TBD	TBD		
	Determine/Validate Quadrants, KPI's, CSF's	AM	N/A	TBD	TBD		
	Determine Internal Metrics	AM	Top Down Metrics Identification Matrix	TBD	TBD		
	Determine Data Collection Methods	AM	N/A	TBD	TBD		

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	Create First Scorecard	AM	Internal Scorecard	TBD	TBD		
	Determine/Create Reports	AM	Internal Scorecard Report	TBD	TBD		
5-7	Create SLA/OLA(s) Framework	C	SLA	08/21/00	10/13/00		
	Create Drafted SLA	C	Metrics Based Service Target Deliverable	08/21/00	10/13/00		
	Determine Data Collection Methods for	C		08/21/00	09/01/00		
	Create Drafted SLA Reporting Process	C		10/15/00	11/01/00		
	Create First SLA Report(s)	IP	Monthly Report due 11/7/00	11/01/00	11/07/00		
	Create Drafted OLA(s)	AM	OLA(s)	TBD	TBD		
	Determine Data Collection Methods for OLA(s)	AM		TBD	TBD		
	Create Drafted OLA(s) Reporting Process	AM		TBD	TBD		
	Create First OLA(s) Report(s)	AM		TBD	TBD		
<b>6-0</b>	<b>Transfer/Hire People</b>						
6-1	Define Capacity Framework	C	High Level Capacity Framework Plan	08/07/00	09/15/00		
	Assess Current Capacity Requirements	C	N/A	08/07/00	09/08/00		
	Develop High Level Capacity Framework	C	High Level Capacity Framework Plan	08/07/00	09/08/00		
	Secure Approval for Framework	C	Approved High Level Capacity Framework Pla	08/07/00	09/15/00		
6-2	Manage Recruiting Process	C	N/A	08/07/00	10/27/00		
	Researching Resumes	C	N/A	08/07/00	10/27/00		
	Conducting Interviews	C	N/A	08/07/00	10/27/00		
	Extending Offers	C	Offer Letters	08/07/00	10/27/00		
6-3	Manage HR Orientation	C	N/A	08/07/00	10/27/00		
	Initial DOE, Firm, Operations Team Orientation	C	N/A	08/07/00	10/27/00		
	Implement Roll-on Checklist/Proc. (Holiday's, etc.)	C	Roll-on Checklist	08/07/00	10/27/00		
	Communicate Performance Management	C	N/A	08/07/00	10/27/00		
	Communicate Community Issues, Assignments	C	N/A	08/07/00	10/27/00		
6-4	Manage/Implement Financial Orientation (ARTES)	C	Financial Orientation Meetings Complete	08/07/00	10/27/00		
6-5	Determine Training Requirements	C	Training Plan	08/07/00	10/27/00		
6-6	Manage People Issues and Concerns	C	N/A	08/07/00	10/27/00		
<b>7-0</b>	<b>Tailor and Implement Service Management</b>						
7-1	Conduct Service Assessment	C	Service Assessment Document	07/31/00	08/11/00		
	Review Existing Documentation and Operations	C	N/A	07/31/00	08/11/00		
	Create Service Assessment Document	C	Service Assessment Document	07/31/00	08/11/00		
7-2	Define Service Model Framework	C	Service Model Framework Developed	08/07/00	08/25/00		
	Review Current Service Model	C	N/A	08/07/00	08/18/00		
	Create/Approve Service Model Framework	C	Service Model Framework Developed	08/07/00	08/25/00		
7-3	Implement Service Process Architecture	C	Process Architecture Document	08/07/00	09/15/00		

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	Create/Approve/Socialize Basic Service Processes	C	N/A	08/07/00	09/15/00		
	Request Management Process Development	C	Request Management Processes	08/07/00	09/15/00		
	Reporting, SLA/OLA Process Development	C	Reporting Processes	08/07/00	09/15/00		
	Issue Management and Escalation Process Dev.	C	Issue and Escalation Processes	08/07/00	09/15/00		
7-4	Implement Service Tools	IP	N/A	08/15/00	11/15/00		
	Create Request Database	C	Request Database Completed	08/15/00	09/22/00		
	Socialize/Approve Request Database	IP	Request Database Approved	08/15/00	11/15/00		
	Create Other Tools (Issue Tracking Tool)	C	Request/Operational Issues Tracking Tool	08/15/00	09/22/00		
	Socialize/Approve Other Tools	IP	N/A	08/15/00	11/15/00		
7-5	Develop Service Management Training	C	Service Management Training Schedule	09/29/00	10/13/00		
	Developing Process Training Documentation	C	Process Training Documents/Presentations	09/29/00	10/28/00		
	Developing Tool Training Documentation	C	Tool Training Documents/Presentations	09/29/00	11/01/00		
7-6	Define Quality Framework	AM	High Level Quality Framework Plan	TBD	TBD		
	Manage Continuous Improvement Effort	AM	N/A	TBD	TBD		
	Assess Current Quality Needs and Requirements	AM	N/A	TBD	TBD		
	Create Operating Plan	AM		TBD	TBD		
	Develop High Level Quality Framework	AM	High Level Quality Framework	TBD	TBD		
	Secure Approval for Framework	AM	Approved High Level Quality Framework	TBD	TBD		
7-7	Develop Customer/User Satisfaction Surveys	AM	Cust./User Satisfaction Surveys	TBD	TBD		
	Create Surveys	AM	Cust./User Satisfaction Surveys	TBD	TBD		
	Secure Approval for Surveys	AM	Approved Surveys	TBD	TBD		
<b>8-0</b>	<b>Manage/Implement Tech. and Work Env.</b>						
8-1	Kickoff Tech. and Work Env. Effort	C	N/A	09/04/00	09/15/00		
	Develop/Validate Development Tool Env.	C	Development Process Framework	09/04/00	09/15/00		
	Secure Approval for Tool Env.	C	Approved Development Process Framework	09/04/00	09/15/00		
	Develop/Validate Impl. Checklist	C	Development Implementation Checklist	09/04/00	09/15/00		
	Secure Approval for Implementation	C	Approved Development Impl. Checklist	09/04/00	09/15/00		
8-2	Assess Current Environment	C	N/A	09/11/00	09/22/00		
	Identify/Validate # of Current Developers	C	N/A	09/11/00	09/22/00		
	Identify/Validate # of Future Developers	C	N/A	09/11/00	09/22/00		
	Assess Current Hardware/Software	C	Hardware/Software Requirements	09/11/00	09/22/00		
	Assess Current Software Licenses	C	Hardware/Software Requirements	09/11/00	09/22/00		
	Assess Current Server Strategy	C	N/A	09/11/00	09/22/00		
	Assess Current Networking Links (WAN/LAN)	C	N/A	09/11/00	09/22/00		
	Assess Current Electrical Requirements	C	N/A	09/11/00	09/22/00		
	Assess Current Operating System Requirements	C	N/A	09/11/00	09/22/00		
	Assess Enhancement vs. Development Guidelines	C	N/A	09/11/00	09/22/00		

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8-3	Define Future Env. (in Reston)	AM	N/A	TBD	TBD		
	Confirm Reston Facility Contact for	AM	Contact Confirmed	TBD	TBD		
	Define Hardware/Software at Reston	AM	N/A	TBD	TBD		
	Identify Procurement Process for Hardware	AM	N/A	TBD	TBD		
	Identify Procurement Process for Software	AM	N/A	TBD	TBD		
	Identify Procurement Process for Software Licenses	AM	N/A	TBD	TBD		
	Define/Formulate Reston Server Strategy	AM	N/A	TBD	TBD		
	Formulate Mirrored Server Strategy at DOE	AM	N/A	TBD	TBD		
	Identify/Develop WAN Requirements	AM	N/A	TBD	TBD		
	Identify/Develop LAN Requirements	AM	N/A	TBD	TBD		
	Identify Data Tracking Database/Server Strategy	AM	N/A	TBD	TBD		
	Plan and Implement Installation of Hardware/Software (in Reston)	AM	N/A	TBD	TBD		
8-4	Facilitate Installation of Hardware	AM	Hardware Installed Successfully	TBD	TBD		
	Facilitate Installation of Software	AM	Software Installed Successfully	TBD	TBD		
	Facilitate Procurement of Software Licenses	AM	Licenses in Security Box	TBD	TBD		
	Facilitate Move with Vendors/Shippers	AM	Shipping/Vendor Contracts	TBD	TBD		
	Facilitate Installation of LAN/WAN Links	AM	N/A	TBD	TBD		
	Facilitate Testing of Hardware/Software	AM	N/A	TBD	TBD		
	Facilitate Testing of LAN/WAN links	AM	N/A	TBD	TBD		
	Develop Fail-Over Software/Hardware Plan	AM	Fail-Over Software/Hardware Plan	TBD	TBD		
8-5	Design Initial Operations Team Work Environment	C	N/A	09/18/00	10/15/00		
	Determine Work Location (cubicles, conference rooms)	C	N/A	09/18/00	10/15/00		
	Secure Workspace Accessories (Printers, copiers, etc.)	C	N/A	09/18/00	10/15/00		
	Secure Initial Facilities (Phones, desks, chairs, etc.)	C	N/A	09/18/00	10/15/00		
<b>9-0</b>	<b>Manage/Implement Testing Tech. and Work Env.</b>		<b>Testing Environment at the VDC</b>				
9-1	Kickoff Testing Tech. and Work Env. Effort	N/A	N/A				
	Develop/Validate Testing Tool Env.	N/A	N/A				
	Secure Approval for Testing Tool Env.	N/A	N/A				
	Develop/Validate Testing Impl. Checklist	N/A	N/A				
	Secure Approval for Implementation	N/A	N/A				
9-2	Assess Current Testing Environment	N/A	N/A				
	Identify/Validate # of Current Testers	N/A	N/A				
	Identify/Validate # of Future Testers	N/A	N/A				
	Assess Current Hardware/Software	N/A	N/A				
	Assess Current Software Licenses	N/A	N/A				
	Assess Current Server Strategy	N/A	N/A				

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	Assess Current Networking Links (WAN/LAN)	N/A	N/A				
	Assess Current Electrical Requirements	N/A	N/A				
	Assess Current Operating System Requirements	N/A	N/A				
	Assess Testing Guidelines	N/A	N/A				
9-3	Define Future Testing Env.	N/A	N/A				
	Confirm Reston Facility Contact for Testing	N/A	N/A				
	Define Testing Hardware/Software	N/A	N/A				
	Identify Procurement Process for Hardware	N/A	N/A				
	Identify Procurement Process for Software	N/A	N/A				
	Identify Procurement Process for Software Licenses	N/A	N/A				
	Define/Formulate Reston Server Strategy	N/A	N/A				
	Formulate Mirrored Server Strategy at DOE	N/A	N/A				
	Identify/Develop WAN Requirements	N/A	N/A				
	Identify/Develop LAN Requirements	N/A	N/A				
	Identify Data Tracking Database/Server Strategy	N/A	N/A				
9-4	Plan and Implement Installation of Hardware/Software	N/A	N/A				
	Facilitate Installation of Hardware	N/A	N/A				
	Facilitate Installation of Software	N/A	N/A				
	Facilitate Procurement of Software Licenses	N/A	N/A				
	Facilitate Move with Vendors/Shippers	N/A	N/A				
	Facilitate Installation of Networking Links	N/A	N/A				
	Facilitate Testing of Hardware/Software	N/A	N/A				
	Facilitate Testing of LAN/WAN links	N/A	Testing of LAN/WAN Connections Complete				
	Develop Fail-Over Software/Hardware Plan	N/A	Fail-Over Software/Hardware Plan				
<b>10-0</b>	<b>Manage/ Implement Contract Management</b>						
10-1	Manage Contract Management	AM	Mentor/Facilitator Established	TBD	TBD		
10-2	Identify Contract Management Support	AM	Commitment Documentation	TBD	TBD		
10-3	Obtain Commitments & Milestones Document	AM	Contract Mgmt Event Summary	TBD	TBD		
10-4	Brief Management Team	AM	Contract Mgmt Presentation	TBD	TBD		
<b>11-0</b>	<b>Operationalize and Validate Financial Mgmt.</b>						
11-1	Validate Tax and Statutory Process	AM	Tax/Statutory Payment Process	TBD	TBD		
11-2	Validate ARC/RRC Process	AM	ARC/RRC Process	TBD	TBD		
11-3	Validate Billing Process	AM	Billing Process	TBD	TBD		
11-4	Validate Chargeback Process	AM	Chargeback Process	TBD	TBD		
11-5	Validate Treasury Management Process	AM	Treasury Mgmt Process	TBD	TBD		
11-6	Secure Approval of BPM Financial Processes	AM	N/A	TBD	TBD		
				TBD	TBD		

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