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# **Project Management Approach and Tools**

***CFO Vision and Strategy***

*April 2000*



# Visioning Approach

## Where are we?



### Roles:

AC: Lead  
SFA: Input

AC: Facilitation  
SFA: Input

AC: Facilitation  
SFA: Decision-making

AC: Support  
SFA: Lead

AC: Support  
SFA: Lead

AC: Support  
SFA: Lead

AC: Support  
SFA: Lead

### Objectives:

- Identify capabilities found in successful customer-driven/ PBOs

- Identify the requirements of the gaps on the CFO processes, organization, & stakeholders

- Develop strategy to achieve initiatives

- Prioritize initiatives
- Identify success measures, key milestones, & responsibilities

- Develop overall program management approach & plan

- Present & confirm plan with CFO and with key SFA stakeholders

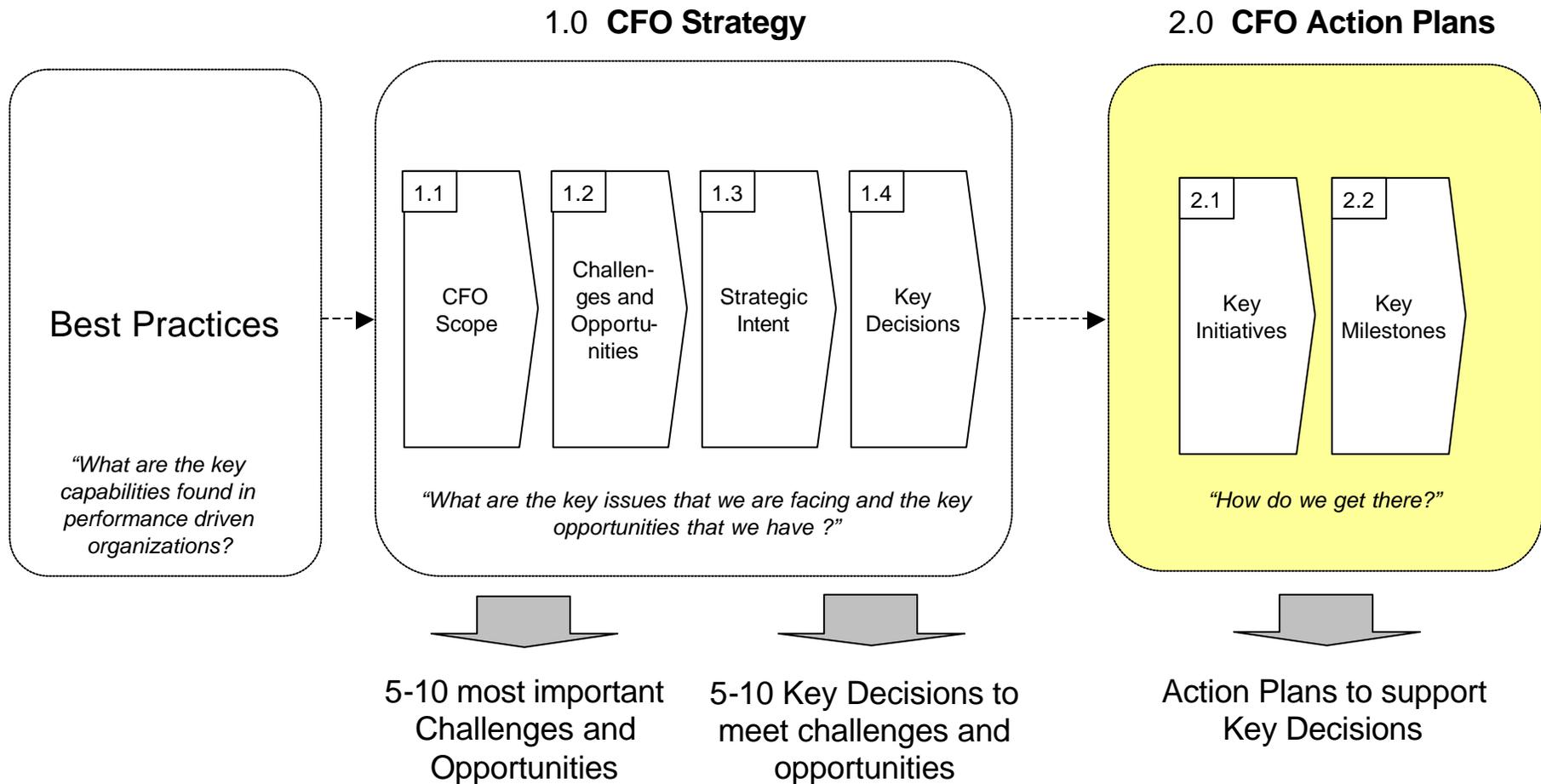
- Ongoing evolution & execution of strategy & plan

- Determine SFA capability priorities & gaps

- Identify the key initiatives necessary to address high priority gaps



## Key Elements of CFO Strategy





## Assess & Integrate Existing Initiatives

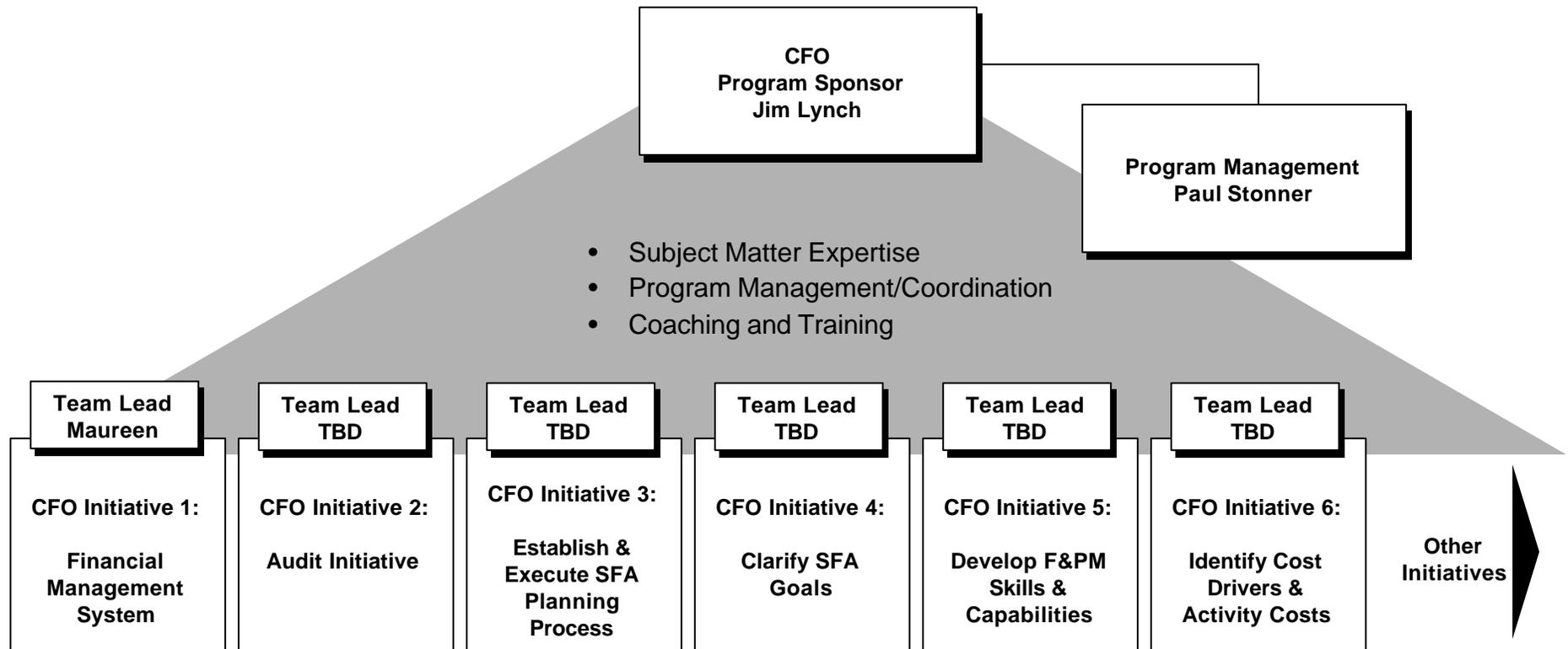
The initiative - “Assess and Integrate Existing Initiatives” will provide the starting point for developing the discipline and structure to manage all CFO projects / initiatives ....

| Strategic Decision:   |  | Assess & Integrate Existing Initiatives |            |         |                                       |  |   |
|---|--|---|------------|---------|---------------------------------------|--|---|
| Initiative  | Description  | Priority                                |            |         | Responsible                           | Milestones   | Measures of Success   |
|   |  | Impact                                  | Difficulty | Overall |                                       |  |   |
| Identify all SFA initiatives                                | Review existing planning documents (e.g. Modernization Blueprint, 5-year/Annual Performance Plans, Management Council's Products & Services Plan, Budget, etc.) to inventory current SFA initiatives | H                                       | H          | H       | Jim Lynch, with Analysis office       | <ul style="list-style-type: none"> <li>Identify existing planning documents</li> <li>Analyze documents</li> <li>Inventory initiatives</li> </ul>   | <ul style="list-style-type: none"> <li>Inventory of SFA initiatives documented</li> </ul>   |
| Identify all CFO initiatives                                | Create comprehensive inventory of CFO initiatives planned and currently underway   | H                                       | M          | M       | Jim Lynch with CFO Division Directors | <ul style="list-style-type: none"> <li>Each division director identifies and inventories initiatives in their area</li> <li>Inventories combined to create comprehensive list</li> <li>Comprehensive inventory reviewed and accepted by CFO Senior leadership</li> </ul> | <ul style="list-style-type: none"> <li>Comprehensive inventory of CFO initiatives documented and reviewed</li> </ul>  |
| Evaluate CFO initiatives for relevance to other initiatives | Evaluate CFO initiatives for consistency with other initiatives. Identify linkages, dependencies, overlaps, priorities, and resource requirements to ensure they are integrated with one another     | H                                       | M          | M       | Jim Lynch with CFO Division Directors | <ul style="list-style-type: none"> <li>Linkages, dependencies, priorities, overlaps, requirements identified</li> </ul>  | <ul style="list-style-type: none"> <li>CFO initiatives integrated with current initiatives and planning documents</li> </ul>                                    |
| Create project management infrastructure                    | Create common methodology, support mechanisms, and tools for program and project management and planning, status monitoring and reporting, and communications across all CFO initiatives             | H                                       | M          | M       | CFO Senior Leadership                 | <ul style="list-style-type: none"> <li>Project management tools and standards identified</li> <li>Project team leads and members trained on tools &amp; standards</li> <li>Tools &amp; standards rolled-out</li> </ul>   | <ul style="list-style-type: none"> <li>Project teams trained on tools &amp; standards</li> <li>Tools &amp; standards rolled-out to all project teams</li> </ul> |
| Manage CFO initiatives as portfolio                         | Utilize project management infrastructure to create greater integration and holistic view of initiatives   | H                                       | M          | M       | CFO Senior Leadership                 | <ul style="list-style-type: none"> <li>Project management tools are used (ie. Status reports completed, etc.)</li> </ul>   | <ul style="list-style-type: none"> <li>Initiatives are integrated</li> </ul>  |

Priority: H = High, M= Medium, L = Low



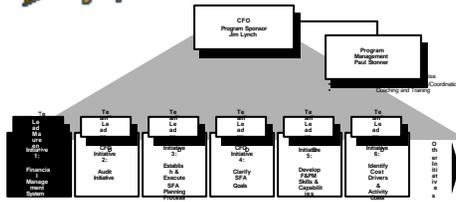
**A Program Management Approach manages initiatives as a portfolio ....**





# Project Structure - FMS Initiative

Illustrative





### Utilizing a Program Management Approach will create some key benefits ....

- Holistic and consistent view of all initiatives / projects within the Portfolio - easier to spot trends, and / or short-term blips
- Greater integration of initiatives will provide earlier identification of project dependencies, opportunities for coordination, and reduction in scope and resource overlap
- Common methodology, support mechanisms, and tools for program and project management and planning, status monitoring and reporting, and communications.



**We will take a few moments to run through some Program and Project Management Tools ....**

- **Overview**
- **Project Facilitation**
  - Meeting Facilitation
  - Status Reporting
  - Issue Management
  - Action Item Management
- **Deliverable Management**
  - Workplan Management
  - Deliverable Tracking
- **Quality Management**
- **Project Logistics**
  - File Name Convention Standards
  - Facilitator Contact List



**Project Management is the discipline of managing multiple tasks in order to ensure that the project objectives related to scope, benefit realization, quality, schedule, and cost are achieved.**

**Objective:** The Project Management Approach provides detailed processes and procedures for planning, oversight, management, and reporting for the CFO initiatives and projects. This approach provides a common methodology for project management that will be applied to all CFO Projects. The outcome of establishing a Project Management Approach will allow management to set direction, make project decisions, and measure the results of the CFO projects against SFA performance objectives.

**Scope:** The Project Management Approach serves as a guideline for defining, measuring, and monitoring a project. Modernization Partner support includes providing a facilitator to work with the team lead for each CFO Project. The facilitator will work with the team lead to incorporate the project management methodologies for meeting facilitation, status reporting, issue management, action item management, workplan management, deliverable tracking and quality management.

**Timeframe:** The Project Management Approach effort for the CFO is currently underway, and will extend through October 2000.



**The Project Management Approach that will be used for CFO is defined by seven key processes depicted below.**





**Meeting facilitation involves skills and techniques to prepare for, conduct, and debrief after a meeting.**

Tool: Meeting Agenda and Facilitation Techniques

Objective: The meeting guidelines are in place to help the project manager prepare for, conduct, and debrief project meetings.

Time Frame: The meeting guidelines should be followed as appropriate.

Delivery: The meeting guidelines should be used for the weekly scheduled standing project meetings and all other project meetings.

Responsibility: Team leads are responsible for preparing, conducting, and debriefing project meetings.

Key Considerations:

- Assemble the right people: Will the person be able to contribute? Are the right decision makers/idea generators there?
- Prepare: The most effective meetings are efficient and well-run.
- Exchange Ideas Respectively
- Follow-Up: Ensure that everyone knows their responsibilities and due dates.





**Meeting facilitation techniques are divided into three categories.**

### **Pre-Meeting Activities**

- Determine type of meeting (i.e., status, working session, etc.)
- Establish meeting objectives and target outcomes
- Determine facilitation technique and assign roles for the meeting (i.e., facilitator, minutes, time keeper, issues/action items recorder)
- Establish meeting date, time, and location (i.e., conference room, bridge for conference call, etc.)
- Create agenda and notify participants of meeting date, time, location, purpose, and agenda



### **During Meeting Activities**

- Review agenda with team and revise agenda as needed
- Establish goals and expectations for outcomes of the meeting
- Cover key topics of discussion that are not within the scope of the meeting
- Respect time commitments
- Review action items and follow-up items prior to wrapping up meeting



### **Post Meeting Activities**

- Summarize meeting discussion points and distribute minutes to team members
- Prepare and attempt to distribute within 3 business days
- Follow-up on action items and unresolved issues prior to next meeting



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**CFO FMS Meeting - Agenda**  
**Wednesday, April 12, 2000 1:00 – 2:00 PM**  
**Conference Room 4027 Bridge Number: 1-888-656-3441 ID: 870-329**

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| <u>Agenda:</u>  | <u>Minutes:</u> |
|---|-----------------|
| I. Introduction/Meeting Objectives  | 5               |
| II. Status/Issues Update <ul style="list-style-type: none"><li>• Status Review</li><li>• Issues Review</li></ul>  | 15              |
| III. Key Discussion Topic(s) <ul style="list-style-type: none"><li>• Review Project Management Approach</li></ul> | 10              |
| IV. Review Action Item List   | 25              |
| V. Wrap Up/Follow Up <ul style="list-style-type: none"><li>• Next Meeting: Wed., April 19 1:00 PM</li></ul>       | 5               |



## Project Facilitation - Meeting Minutes Example

### CFO FMS Meeting April 12, 2000, 1:00 – 2:00 PM EST Meeting Minutes

**ATTENDEES:** Anna, Yoko, Marie, Frank,

**RECAP FROM 4/12/2000**

#### Team Leads Update

#### I. Introduction/Meeting Objectives

- High-level overview of the CFO FMS Project Management Approach.

#### II. Status/Issues Update

- Team lead and facilitator initial meetings are in process. All initial meetings should be completed by Friday, April 21<sup>st</sup>.

#### III. Key Discussion Topic(s)

Karen viewed the Project Management Approach, focusing on the following points within each section:

- Meeting Facilitation (pg. 4) – Karen briefly presented the tasks involved with meeting facilitation. He pointed out that team leads should provide sufficient time before and after a meeting to ensure that all main points and results of the meeting were clear and achieved.
- Status Reporting (pg. 8) - Karen encouraged the team leads to use status reports as a vehicle to report on the work and accomplishments of the team. Status should be reported whether the tasks performed achieved minimal or major progression toward deliverable completion. Each week will have tasks performed that are associated with deliverable progress. Karen stated that the first round of status reports will be due on Thursday (4/20). Each team lead should e-mail status reports to their facilitator by 2:00 p.m. (the delivery process has changed since the meeting discussion).
- Issue Management (pg. 10) – Karen emphasized the importance of identifying issues up front in order to minimize risk. Encouraged utilizing the standing team meetings to identify and resolve issues. The prioritization of issues, he explained, are directly linked to workplan, scope, and dates. Urgent and High issues will be escalated to Jim through the status reports. Urgent issues that are mission critical should be escalated prior to status report delivery.
- Task Management (pg. 13) – Karen touched upon the importance of creating action item lists and delegating tasks to team members.
- Workplan Management (pg. 15) – Team leads will be responsible for completing their workplans by the end of the month. Karen encouraged the team leads to leverage their facilitators and the workplan template that will be provided to help them develop their workplans. Concern was expressed by the team leads who currently do not have MS Project (see follow-up item below).

### CFO FMS Meeting April 12, 2000, 1:00 – 2:00 PM EST Meeting Minutes

- **Deliverable Tracking (pg. 17)** – Maureen described deliverable management and the role that Modernization Partner will take in reporting the overall program status.
- **Quality Management (pg. 19)** - Maureen stressed the need for deliverable review sessions, both formal and informal, so that checkpoints for quality may be incorporated throughout the deliverable development process.

#### IV. Review Action Items

- To be reviewed during April 19<sup>th</sup> meeting.

#### V. Wrap-Up / Follow-Up Items

- Teams leads and facilitators need to set up times and dates for weekly touchpoint meetings.
- Team leads will be responsible for completing their first status report on Thursday, April 20<sup>th</sup>.
- Investigate deploying MS Project to the team leads who do not have the application on their desktop .
- Provide the team leads with templates of all PMO tools
- Investigate the possibility of access to a common folder on the
- Volunteer needed from each region to participate on the Policy and Analysis team (Team Leads).
- Review and incorporate the Project Management Approach and tools in managing their project (Team Leads).
- Next meeting - Wednesday, April 19, 2000 1:00 p.m. in room 4027

Illustrative



## Project Facilitation - Status Reporting

**Status reporting involves updating key stakeholders on the progress of the project, including accomplishments, planned activities, issues, and risks. Status reports will be prepared by each team.**

Tool: Status Report

Objective: Effective status reporting provides accurate and timely information on the progress and performance of each CFO project.

Time Frame: The status report package should be delivered every Thursday by 2:00 PM. The status report package includes the status report, issues log, and action item list.

Delivery: Status reports should be sent to team facilitator via e-mail.

Responsibility: Team leads are responsible for project status reports.

Key Considerations: Attention should be placed in preparing Status Reports. All status reports will be available for review by key stakeholders.





## Project Facilitation - Weekly Status Report

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| <b>WEEKLY STATUS REPORT</b>   |  |  |  |                            |                                       |
|---|--|--|--|----------------------------|---------------------------------------|
| <b>(4/13/2000 through 4/20/2000)</b>  |  |  |  |                            |                                       |
| <b>Project Name</b>   |  |  |  |                            |                                       |
| <b>Activity Summary (Week ending: 4/20/2000)</b>  |  |  |  |                            |                                       |
| <b>Planned Activities</b>   |  |  | <b>Results</b>   |                            |                                       |
| <ul style="list-style-type: none"> <li>• Initial meeting with facilitator</li> <li>• Initial team meeting</li> <li>• Attended weekly team lead meeting</li> </ul>   |  |  | <ul style="list-style-type: none"> <li>• Established standard weekly touchpoint meetings</li> <li>• Reviewed team charter</li> <li>• Reviewed Project Management approach</li> </ul> |                            |                                       |
| <b>Plans (Week ending: 4/27/2000)</b>   |  |  |  |                            |                                       |
| <b>Planned Activities</b>   |  |  |  |                            |                                       |
| <ul style="list-style-type: none"> <li>• Prepare prep material for weekly team meeting</li> <li>• Gather information on current environment</li> <li>• Prepare material for reengineering workshop</li> </ul> |  |  |  |                            |                                       |
| <b>Schedule of Key Meetings (Week ending: 4/27/2000)</b>  |  |  |  |                            |                                       |
| <b>Key Meeting</b>  |  |  |  | <b>Date</b>                |                                       |
| • Reengineering Workshop  |  |  |  | 4/24/2000, Mon. 10:00 a.m. |                                       |
| • Standing Meeting  |  |  |  | 4/25/00, Tues. 10:00 a.m.  |                                       |
| • Team Lead Meeting   |  |  |  | 4/26/00, Wed 1:00 p.m.     |                                       |
| <b>Issue Summary (Week ending: 4/20/2000)</b>   |  |  |  |                            |                                       |
| <b>Priority</b>   | <b>Issue<br/>(Include only<br/>Urgent or High)</b> | <b>Recommended Solution</b>                  | <b>Responsible</b>   | <b>Date<br/>Logged</b>     | <b>Status<br/>(Include only Open)</b> |
| High  | Need team members from regional offices            | Contact specific members of regional offices | J. Doe   | 04/12/00                   | Open                                  |
|   |  |  |  |                            |                                       |



**Issues represent barriers to progress. Issue management involves the identification, analysis, escalation, resolution, and reporting of concerns and risks that have the potential to impact the success of the project.**

Tool: Issue Log

Objective: Issue management highlights risks within a project and facilitates timely, focused issue resolution.

Time Frame: On-going

Delivery: The issue log should be updated each meeting and escalated issues will be documented on the weekly status report. The issues log should be included in the status report package. Urgent issues should be escalated immediately.

Responsibility: Team leads are responsible for managing the resolution efforts of issues. This involves judging the severity of the issue and delegating tasks to resolve the issue. Team leads are ultimately responsible for escalating the issue as needed and ensuring the issue is resolved within a timely manner to minimize risks. Team members are responsible for identifying possible issues at meetings, proposing possible solutions, and acting on issues for which they have responsibility.

Key Considerations: Identifying and resolving issues are key disciplines for all team members to have. All projects encounter issues throughout the lifecycle. Swift issue resolution is key to project success.



**Issues will be categorized into four levels of importance based on their impact to the project goals and objectives, timeliness, and cost:**

**Urgent** (i.e., stops work effort; drastic schedule and/or scope change; escalate to senior management on weekly status report)

**High** (i.e., adversely impacts work effort, schedule, and/or scope; may need to be escalated to senior management if not resolved in a timely manner)

**Medium** (i.e., may negatively impact work effort, schedule, and/or scope; usually can be resolved internal to team)

**Low** (i.e., minimal impact on work effort, schedule, and/or scope; can be resolved easily internal to team)



## Project Facilitation - Issue Log Example

Illustrative

| Project Name              |             |   |  |           |           |             |          |  |
|---------------------------|-------------|---|--|-----------|-----------|-------------|----------|--|
| Issues Log as of 04/14/00 |             |   |  |           |           |             |          |  |
| #                         | DATE LOGGED | ISSUE DESCRIPTION                       | IMPACT   | *PRIORITY | RES. DATE | ASSIGNED TO | **STATUS | ACTION REQUIRED/<br>RESOLUTION               |
| 1.                        | 04/12/00    | Need team members from regional offices | Lack of regional input may result in incomplete requirements | High      | mm/dd/yy  | J. Doe      | Open     | Contact specific members of regional offices |
| 2.                        |             |   |  |           |           |             |          |  |
| 3.                        |             |   |  |           |           |             |          |  |

Date Issue Logged

Brief and concise description of the problem.

Priority can be one of the following categorizes: Urgent, High, Medium, or Low. See definitions on prior slide. Priority impacts prioritization of tasks and decisions to escalate.

Person responsible for resolving the issue.

Brief and concise description of the issue's resolution. Reference other documents as needed.

Issue number

The areas are impacted and the possible outcome if the problem is not addressed appropriately.

Date by which issue must be resolved.

Status of the issue. The status can be either be 'Closed' or 'Open'.



**Action item management is the process of identifying, managing, and completing action items required to successfully complete a major task or deliverable. Project action item management involves compiling a list of all action items/tasks required to complete a deliverable on the workplan.**

Tool: Action Item List

Objective: The action item list allows the project manager to track all action items associated with completing a deliverable. The action item list also serves as a method to record status/resolutions for completed tasks and action items.

Time Frame: Team leads should update and review the task list on a weekly basis during the weekly scheduled project meeting.

Delivery: The action item list should be included in the weekly status report package.

Responsibility: Team leads are responsible for developing and managing the task list. However, team members should contribute by identifying and completing action items.

Key Considerations: Task lists are an effective method to manage project tasks and action items. It is a way to track tasks and their assigned person, due date, status, and resolution.



## Project Facilitation - Action Item List Example

Illustrative

**Project Name**  
**Action Items as of 04/14/00**

| #  | DATE LOGGED | ACTION ITEM DESCRIPTION  | ASSIGNED TO | IMPACTED AREAS | DUE DATE | STATUS*   | COMMENTS             |
|----|-------------|--|-------------|----------------|----------|-----------|----------------------|
| 1. | 04/05/00    | Check with CIO regarding compatibility of technical design with enterprise wide technical architecture | J. Smith    | CIO            | 04/14/00 | Completed | Design is compatible |
| 2. |             |  |             |                |          |           |                      |
| 3. |             |  |             |                |          |           |                      |

Action item number.

Date action item is documented on list.

Detailed action item description

Person responsible for completing action item.

Other areas impacted by action item (i.e., CIO, Students, Schools, etc.)

Date the action item should be completed

Status: Not Started, In Progress, and Completed

Comments section includes more detailed information on the action item.



**Workplan Management is the process of allocating and managing major units of work, tasks, people, and time that are required to complete a project. The workplan management process identifies dependencies between tasks and milestones for meeting project goals. Project progress is measured against the workplan.**

Tool: Workplan

Objective: The workplan allows the project manager to track the project schedule as a measure of the effectiveness of the work being done.

Time Frame: The workplan should be created during the first three weeks of the project.

Delivery: The workplan should be updated on a bi-weekly basis and sent to the project facilitator through e-mail. The workplan should be used as a schedule reference when completing the status reports. Workplans should be created using Microsoft Project.

Responsibility: Team leads are responsible for developing and managing the workplan. Facilitators will provide a workplan template.

Key Considerations: Workplans are developed based on estimates and updated according to actuals. Workplans are an effective way to measure and report schedule variance. Schedule variances do occur, however, team leads are responsible for understanding the implications of these variances.



## Deliverable Management - Workplan Example

Illustrative

| ID | i             | Task Name                             | Duration      | Start              | Finish             | 9, '00      |   |   |   |   |   |   | Apr 16 |  |
|----|---------------|---------------------------------------|---------------|--------------------|--------------------|-------------|---|---|---|---|---|---|--------|--|
|    |               |                                       |               |                    |                    | M           | T | W | T | F | S | S | M      |  |
| 1  |               | <b>Current Environment Assessment</b> | <b>3 days</b> | <b>Tue 4/11/00</b> | <b>Thu 4/13/00</b> | [Gantt bar] |   |   |   |   |   |   |        |  |
| 2  |               | Compile functional document           | 2 days        | Tue 4/11/00        | Wed 4/12/00        | [Gantt bar] |   |   |   |   |   |   |        |  |
| 3  | Calendar icon | Compile technical designs             | 2 days        | Tue 4/11/00        | Wed 4/12/00        | [Gantt bar] |   |   |   |   |   |   |        |  |
| 4  | Calendar icon | Meet with Functional Users            | 1 day         | Thu 4/13/00        | Thu 4/13/00        | [Gantt bar] |   |   |   |   |   |   |        |  |
|    |               |                                       |               |                    |                    | [Gantt bar] |   |   |   |   |   |   |        |  |
|    |               |                                       |               |                    |                    | [Gantt bar] |   |   |   |   |   |   |        |  |
|    |               |                                       |               |                    |                    | [Gantt bar] |   |   |   |   |   |   |        |  |

|   |   |  |  |  |                                      |  |
|---|---|--|--|--|--------------------------------------|--|
| <p>Major task/<br/>individual<br/>task number..</p> | <p>Major task name.<br/>Normally phrased as<br/>a noun.</p> | <p>Individual tasks<br/>associated with the<br/>overall task name.<br/>Usually written as a<br/>verb phrase.</p> | <p>The time it takes to<br/>complete the task.</p> | <p>The start date of<br/>the task.</p> | <p>The end date of<br/>the task.</p> | <p>Resource assigned to<br/>task and percentage<br/>of work effort for the<br/>resource.</p> |
|---|---|--|--|--|--------------------------------------|--|



## Deliverable Management -Deliverable Tracking

**Deliverables are the work products of a project (i.e. current Environment Assessment, Best Practices Report, List of Recommendations, Conceptual Design, etc). Deliverable Management is the identification, tracking, and management of deliverables which show the progression and completion of a particular phase of the project.**

Tool: Deliverable Tracking Report (Updated by Facilitators)

Objective: Deliverable management ensures the timely completion of the work products that are essential to the successful completion of the project.

Time Frame: On-going

Delivery: All deliverables should be submitted according to the respective project workplan.

Responsibility: Team leads are responsible for managing and assigning the work involved with completing each deliverable. Facilitators will be responsible for updating the Deliverable Tracking Report.

Key Considerations: Deliverable sign-off procedures should be followed when submitting draft and final versions.



# Deliverable Management - Deliverable Tracking Report

Illustrative

| Key:   |                                   |               |          |                         |                           |                   |                  |               |          |
|--|-----------------------------------|---------------|----------|-------------------------|---------------------------|-------------------|------------------|---------------|----------|
| ○ - Not Started    ⚠ - Not Started and behind Schedule |                                   |               |          |                         |                           |                   |                  |               |          |
| ◐ - In-Progress    ● - Completed                       |                                   |               |          |                         |                           |                   |                  |               |          |
| Deliverables   |                                   |               |          |                         |                           |                   |                  |               |          |
| Initiative   | Team Lead                         | Facilitator   | Workplan | Current Env. Assessment | Improvement Opportunities | Conceptual Design | Technical Design | Business Case | Comments |
| <b>FMS Processes Reengineering</b>                     |                                   |               |          |                         |                           |                   |                  |               |          |
| GL Process   | F. Ramos                          | B. Dublin     |          |                         |                           |                   |                  |               |          |
| Oversight & Technical Assistance                       | A. Cimino                         | B. Dublin     |          |                         |                           |                   |                  |               |          |
| Policy and Analysis                                    | R. Streets                        | B. Dublin     |          |                         |                           |                   |                  |               |          |
| Contract Management                                    | A. Allen                          | B. Dublin     |          |                         |                           |                   |                  |               |          |
| <b>Channel Process Reeng.</b>                          |                                   |               |          |                         |                           |                   |                  |               |          |
| Enh. Part. Relationship Mngmt.                         | Reynolds, Ishaq, Stoddard, Cimino | TBD           |          |                         |                           |                   |                  |               |          |
| Voluntary Flexible Agreements                          | C. Ishaq                          | J. Shortlidge |          |                         |                           |                   |                  |               |          |
| Regulatory Process Improvements                        | J. Reynolds                       | TBD           |          |                         |                           |                   |                  |               |          |
| Default Reduction Incentives                           | J. Reynolds                       | TBD           |          |                         |                           |                   |                  |               |          |
| Enh. Monitoring of Fin. Partners                       | K. Turner                         | J. Shortlidge |          |                         |                           |                   |                  |               |          |
| <b>Enabling Technology</b>                             |                                   |               |          |                         |                           |                   |                  |               |          |
| Web Portals for CFO                                    | M. Duffin                         | J. Conje      |          |                         |                           |                   |                  |               |          |
| Common Third Party (Middleware)                        | J. Reynolds                       | J. Conje      |          |                         |                           |                   |                  |               |          |
| Document/Workflow Mngmt.                               | C. Smith                          | J. Conje      |          |                         |                           |                   |                  |               |          |
| Data Warehouse for CFO                                 | C. Smith                          | J. Conje      |          |                         |                           |                   |                  |               |          |
| <b>Employee Transformation</b>                         |                                   |               |          |                         |                           |                   |                  |               |          |
|  | Carrie Smith                      | J. Shortlidge |          |                         |                           |                   |                  |               |          |
| <b>Service Delivery</b>                                |                                   |               |          |                         |                           |                   |                  |               |          |
| Expanded FAFSA to Trading Part.                        | TBD                               | B. Dublin     |          |                         |                           |                   |                  |               |          |
| Pilot Electronic Certification                         | C. Whitaker                       | J. Conje      |          |                         |                           |                   |                  |               |          |
| E-commerce Data Exchange                               | F. Ramos                          | B. Dublin     |          |                         |                           |                   |                  |               |          |



**Quality Management involves defining the process for understanding and managing the expectations of stakeholders; defining and implementing a process to deliver those expectations; measuring and verifying the ability of those processes to deliver those expectations; and improving delivery capability in terms of people, process, and technology. Quality should be incorporated in all aspects of project facilitation and deliverable management.**

Tool: To be determined

Objective: To ensure that the project meets and exceeds the expectations of the stakeholders, adhering to established business guidelines and processes. In addition, effective quality management provides a consistent and encompassing framework for managing the quality of the project and work products.

Time Frame: On-going

Delivery: Quality reviews should be informally and formally incorporated throughout the project lifecycle.

Responsibility: Team leads are responsible for involving key stakeholder participation during reviews.

Key Considerations: Various stakeholders, who will be identified, are expected to sign-off on key deliverables.