

STUDENT FINANCIAL ASSISTANCE

MODERNIZATION PARTNER

Appendix VI. MONTHLY MODERNIZATION PROGRAM SCORECARDS

STATUS AS OF February 23, 2001

MODERNIZATION PARTNER PROGRAM SUMMARY

	CFO				CIO				Financial Partners		Schools Channel		Students Channel			Organizational Transformation					
	TO 20 - CFO Transformation	TO 25 - Electronic Document Management (EDM)	TO 25 - FMS Applications Operations	TO 45 - Financial Management System (FMS)	TO 12 - School Portal and IFAP Conversion	TO 32 - SDLC/ITP Process Guide	TO 34 - Intranet Operations	TO 43 - School Portal and IFAP Applications Management	TO 44 - Title IV/WAN IPT Support	TO 40 - FFEL System Retirement Analysis	TO 50 - Financial Partners Data Mart	TO 19 - Common Origination and Disbursement	TO 49 - Campus Based Programs Replatforming	TO 24 - Direct Loan eServicing	TO 26 - CDS Simplification	TO 37 - Financial Analysis Support and Buildup	TO 42 - FAFSA on the Web Redesign	TO 29 - SFA University Mod Support	TO 30 - HR Modernization Support	TO 31 - SFA University Front-to-Back	TO 38 - Workforce Transition
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Overall	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Yellow	Green	Green
Scope	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Task Order	Green	Yellow	Green	Red	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green
Schedule Performance Against Work Performed	Green	Green	Green	Yellow	Yellow	Yellow	Green	Green	Green	Yellow	Yellow	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green
Architecture	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Risk	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Yellow
Quality	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green
Communication / Change Management	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green
Human Resources	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Commercial Off the Shelf Software (COTS)	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

The Scorecard Assessment Criteria is located on the last page of the packet.

Beginning this period, comments will not be included for measures assessed as "Green" unless additional information needs to be communicated. Please see the Scorecard Assessment Criteria for an explanation of the "Green" assessment for each measure.

Modernization Partner Monthly Scorecard Summary:

TO- 45 Financial Management System (FMS)

FMS Phase III Task Order has not yet been signed. Ongoing issues that may impact scope and schedule include: ED CFO support for GAPS changes, agreement on a Pell solution, and ongoing Phase II Operations and Training support. The combination of issues provides the greatest risk to the project success.

TO 42- FAFSA on the Web Redesign

The modification to the FAFSA on the Web Redesign Task Order has not yet been signed. The project plan has been developed and is being reviewed by the SFA Students Channel and Modernization Partner leadership. The project is proceeding according to the draft version of the project plan.

TO 20 - CFO Transformation

Planned Go Live Date: N/A

ITR: Bill Walsleben

SFA Contact: Jim Lynch

Modernization Partner Contact: Linh Nguyen

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The Task Order is complete. All deliverables have been accepted.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 25 - Electronic Document Management (EDM)

Planned Go Live Date: TBD

ITR: Bill Walsleben

SFA Contact: Cheryl Queen

Modernization Partner Contact: Bill Walsleben

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	Requirements gathering is nearing completion. Deliverable 25.2.4- Design Specification is being updated to incorporate SFA's comments.
Green	Green	Scope	The Statement of Objectives (SOO) was updated on 2/8/01 to reflect the change in scope from an Electronic Documents Management (EDM) System to a Records Management (ERM) System.
Yellow	Yellow	Task Order	The Task order is being updated to reflect the change in scope from an EDM system to an ERM system and will be resubmitted to SFA for approval by 3/5/01.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	Development of Architecture recommendations will be part of the response to the revised SOO.
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	OpenText has been recommended as the ERM product.

TO 35 - FMS Applications Operations

Go Live Date: FMS went live 10/01/00
 ITR: Phill Thomas
 SFA Contact: Paul Stonner
 Modernization Partner Contact: Tom Schweikert

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The Operations team is progressing with tasks identified in the workplan.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 45 - Financial Management System (FMS)

Go Live Date: 10/31/01

ITR: Bill Walsleben

SFA Contact: Paul Stonner

Modernization Partner Contact: Francesca Keating

January 31 Assessment	February 23 Assessment	Measure	Comments
Yellow	Yellow	Overall	FMS Phase III TO has not yet been signed. Ongoing issues that may impact scope and schedule include. The combination of issues provides the greatest risk to the project success.
Yellow	Yellow	Scope	The scope for Phase III has been defined and requirements are being documented. Ongoing issues that may impact scope include: (1) CFO process re-engineering and transformation, (2) ED support for GAPS changes, (3) Phase II training and production support.
Yellow	Red	Task Order	The task order for Phase III has not yet been signed.
Yellow	Yellow	Schedule Performance Against Work Performed	Project may not be able to meet milestones based on the scope issues previously discussed. The project is now slipping behind schedule due to the lack of scope agreement and/or definition.
Green	Green	Architecture	A web-design for Phase III LEAPP/SLEAPP user connectivity has been defined.
Green	Yellow	Risk	Potential risks have been identified and assessed. The lack of an agreement on a Pell solution has become a risk. The team has a tentative mitigation strategy and the risk should be resolved within the next two weeks. Mitigation strategies have been identified for previously identified risks.
Green	Green	Quality	
Green	Green	Communication/Change Management	
Yellow	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	The Oracle Federal Financials package was implemented in Phase 2. FMS Phase 3 will build upon the Oracle Federal Financials package.

TO 12 - School Portal & IFAP Conversion

Planned Go Live Date: TBD

ITR: David Marr

SFA Contact: Sandi Foy-McCabe

Modernization Partner Contact: Yateesh Katyal

January 31 Assessment	February 23 Assessment	Measure	Comments
Red	Green	Overall	The scheduled go-live of 2/20/01 was postponed by SFA to allow more time to deploy content. The application will go-live by the week of 3/5/01. Modernization Partner will proceed with lockdown activities once SFA has committed to the exact implementation date.
Green	Green	Scope	
Yellow	Green	Task Order	
Yellow	Yellow	Schedule Performance Against Work Performed	The production readiness review was successfully completed on 2/7/01 and the applications were scheduled to go-live on 2/20/01. SFA has decided to delay the implementation to allow more time to deploy content. SFA will decide on a new go-live date during the week of 2/23/01.
Green	Green	Architecture	
Green	Green	Risk	
Yellow	Green	Quality	The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order. Quality has been controlled through the testing process, the Production Readiness Review and the SFA QA Team (Mike Rockis).
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	The School Portal and IFAP applications are both making use of multiple COTS products.

TO 32 - SDLC/IPT Process Guide

Planned Go Live Date: N/A

ITR: Peter Elms

SFA Contact: Connie Davis

Modernization Partner Contact: Tom Day

January 31 Assessment	February 23 Assessment	Measure	Comments
Yellow	Yellow	Overall	Deliverables 32.1.2- SDLC/IPT Process Guide and 32.1.3 - SDLC/IPT Deployment Plan were accepted by SFA. Deliverable 32.1.4- SDLC/IPT Training Content is being revised and will be reviewed with SFA prior to final submission.
Green	Green	Scope	
Green	Green	Task Order	
Yellow	Yellow	Schedule Performance Against Work Performed	Project is achieving milestones on schedule. The team is revising the final deliverable, 32.1.4- SDLC/IPT Training Content, before submitting it to SFA for final acceptance on 2/26/01.
Green	Green	Architecture	
Yellow	Yellow	Risk	Delays associated with the acceptance of the deliverables present a risk to timely completion of the task order.
Red	Green	Quality	Deliverable 32.1.2- SDLC/IPT Process Guide has been accepted by SFA, and quality issues resolved.
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	

TO 34 - Intranet Operations

Go Live Date: 12/08/00

ITR: Phill Thomas

SFA Contact: Karen Freeman / David Moore

Modernization Partner Contact: Tom Schweikert

January 31 Assessment	February 23 Assessment	Measure	Comments
Red	Green	Overall	The Intranet Operations team is fully functional. Funding for SFANet operations through 3/31/01 was approved.
Yellow	Green	Scope	
Red	Green	Task Order	A modification to this Task Order was submitted on 1/19/01. Approval was received from the CO on 2/13/01.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 43 - School Portal and IFAP Applications Management

Planned Go Live Date: N/A

ITR: Phill Thomas

SFA Contact: Colleen Kennedy

Modernization Partner Contact: Tom Schweikert

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The Operations and Transition team is progressing with tasks identified in the task order.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 44 - Title IV/WAN IPT Support

Planned Go Live Date: TBD

ITR: Peter Elms

SFA Contact: David Moore

Modernization Partner Contact: Rick Simon

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The team is performing to the schedule.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 40- FFEL System Retirement Analysis

Planned Go Live Date: N/A

ITR: Chris Ward

SFA Contact: Johan Bos-Beijer

Modernization Partner Contact: Reginald Ewing

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The Project is proceeding as scheduled with no major issues.
Green	Green	Scope	
Yellow	Green	Task Order	The task order was approved by the CO on 2/15/01.
Green	Yellow	Schedule Performance Against Work Performed	The second deliverable 40.1.2 - FFEL System Analysis and Inventory was submitted to SFA on 2/16/01. Work is proceeding with the third deliverable 40.1.3- FFEL System Business and Risk Assessment. The deliverable due date has be changed from 2/28/01 to 3/30/01. This change will not affect the overall project schedule and the SFA GM has approved the change.
Green	Green	Architecture	The Project is in full compliance with Modernization Blueprint. Architecture will not be affected during the analysis phase of TO 40.
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 50- Financial Partners Data Mart

Planned Go Live Date: 4/30/01

ITR: Chris Ward

SFA Contact: Anna Allen

Modernization Partner Contact: Nancy Krecklow

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	Held several meetings with the General Manager to assist in the Task Order proposal approval process for Release 1.
Green	Green	Scope	
Red	Green	Task Order	The task order was approved on 2/15/01.
Green	Yellow	Schedule Performance Against Work Performed	A revised project plan, which includes revised deliverable dates, has been developed. We are awaiting approval of the revised dates from the General Manager and/or the Deputy General Manager.
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	Informatica and MicroStrategy products will be implemented for the Data Mart. No application COTS are currently planned.

TO 19 - Common Origination and Disbursement

Planned Go Live Date: 2/2002

ITR: David Marr

SFA Contact: Mary Haldane, Denise Merchant

Modernization Partner Contact: Katie Crowley, Gene Murphy

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The overall assessment for implementing the COD Phase II project plan is good. Task Order modifications, which outline clearly defined deliverable time frames and dates for this Phase II, have been approved by the Channel.
Green	Green	Scope	The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner. The Task Order modification allowed for inclusion of Common Record definition.
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	SFA participation continues to increase. Workgroups composed of SFA and Modernization Partner personnel have been established. These workgroups incorporate existing business functional expertise with COD goals.
Yellow	Yellow	Communication/Change Management	Current communication efforts focus on initial COD implementation activities (e.g., COD partner announcement, facilitation of meetings with school user groups). Organization, communication, training and deployment activities have been identified and incorporated into the COD Implementation workplan. An assessment of the organization's state of change readiness has started, but a full analysis is blocked by a lack of communication with the Union and Schools channel employees regarding COD. Have planned meetings with Kay Jacks, Schools Channel General Manager, to develop a plan for communicating with the Union and SFA employees for 3/1/01.
Green	Green	Human Resources	Current human resource needs are in the process of being met. New staffing requirements have been identified and position requests opened. Two positions remained unstaffed at this time with a readily available & qualified candidate identified for one of the remaining two positions.
Green	Green	Commercial Off the Shelf Software (COTS)	A review of COTS products has been incorporated into the project's work plan.

TO 49 - Campus Based Programs Replatforming

Planned Go Live Date: N/A

ITR: David Marr

SFA Contact: Milton Thomas

Modernization Partner Contact: Kerry Trahan/Jay Schooley

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	Task Order completed. Awaiting final approval of deliverable 49.1.3- Preliminary Logic Design Document, Preliminary Data Model, and Testing Requirements Document. Completed and received SFA sign-off on deliverables 49.1.1- Project Team Charter and Project Plan, 49.1.2- System Requirements Document, Web Front-End Design document, and Architecture and Tools Selection Document, and 49.1.4- CB Programs Phase II Business Case.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	Deliverables scheduled for 1/31/01 were submitted. Business case for continuation of Phase 2 and will be represented to the IRB on 3/2/01.
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	The requirements phase resulted in recommendations on how much re-use can be achieved from current applications. This review included current FISAP modules as well as EdExpress.

TO 24 - Direct Loan eServicing

Planned Go Live Date: 10/01

ITR: Martin Renwick

SFA Contact: Sybil Phillips

Modernization Partner Contact: Gary Williams

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The project is on schedule to meet the task order requirements.
Green	Green	Scope	
Green	Green	Task Order	The Task Order was awarded on 12/21/00. The first deliverable is scheduled for 2/28/01. The Task Order is in the process of being extended through 4/2/01 to coincide with the beginning of the Shared Savings Contract.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	A COTS solution is planned. Selection process included within this phase of work for Internet billing provider.

TO 26 - CDS Simplification

Go Live Date: 11/17/00

ITR: Martin Renwick

SFA Contact: Jennifer Douglas

Modernization Partner Contact: Kerry Trahan

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	Implementation was accomplished on 11/17/00. SFA is currently realizing savings from this project. A meeting was held 2/5/01 to finalize the savings measurement process. Waiting for baseline data from the CO.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	Microstrategy and Informatica COTS products are being utilized.

TO 37 - Financial Analysis Support and Buildup

Planned Go Live Date: N/A

ITR: Martin Renwick

SFA Contact: Jennifer Douglas

Modernization Partner Contact: Louella Gorman

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The Project is proceeding as scheduled with no major issues.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 42- FAFSA on the Web Redesign

Planned Go Live Date: N/A

ITR: Martin Renwick

SFA Contact: Jeanne Saunders

Modernization Partner Contact: Mark Raulin

January 31 Assessment	February 23 Assessment	Measure	Comments
Yellow	Yellow	Overall	New detailed project plan was submitted to SFA on 2/8/01. Project plan has been reviewed by SFA. Currently, there is not agreement between the Release 6.0 developer (NCS) and the Release 5.5 developer (Meritage) with respect to the handoff dates for testing. The project team is working with SFA and the developers to resolve the situation.
Yellow	Green	Scope	
Yellow	Yellow	Task Order	An Authorization to Proceed (ATP) has been issued for the first two deliverables on the original task order. The original task order has been updated to better reflect the project plan. The updated task order has been presented to SFA for review. The project team is awaiting acceptance of the task order.
Yellow	Yellow	Schedule Performance Against Work Performed	The project is progressing according to the updated project plan. The project team is still working to get final agreement between the Release 5.5 developer and the Release 6.0 developer on the dates for testing handoff. There is approximately a two week difference between the hand off dates both developers are proposing.
Green	Green	Architecture	
Yellow	Yellow	Risk	Potential risks to both Releases 5.5 and 6.0 have been identified and assessed. Mitigation strategies have been developed. Once the task order and project plan are finalized, these risks should be minimized.
Yellow	Yellow	Quality	The Project has developed a documented quality plan, which is being updated to reflect scope changes.
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	The project team is utilizing the standard hardware and software identified by the SFA CIO.

TO 29 - SFA University Modernization Support

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Anne Teresa

Modernization Partner Contact: Linh Nguyen

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The project is on schedule. Deliverable 29.1.4 - Action Plan for Implementation will be delivered as planned on 2/28/01.
Green	Green	Scope	
Green	Green	Task Order	Task Order deliverables have been accepted on time per the contract. A potential modification to the Task Order for the remaining deliverables is under consideration by the project sponsor, Anne Teresa.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	Communication and change management strategies have been identified and incorporated into the project work plan. A communication plan for Achievement Level Working Sessions has been implemented and working session follow-up emails have been sent.
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	The team has identified potential COTS solutions to meet SFA University's knowledge management needs.

TO 30 - HR Modernization Support

Planned Go Live Date: 5/30/01

ITR: Linh Nguyen

SFA Contact: Calvin Thomas

Modernization Partner Contact: Stacy Roux

January 31 Assessment	February 23 Assessment	Measure	Comments
Yellow	Yellow	Overall	All scheduled work for TO-30 is complete. The Performance Development Process (PDP) implementation will be transferred to TO 62- HR Modernization. The proposed completion date of the PDP is 5/30/01.
Green	Green	Scope	
Green	Green	Task Order	
Yellow	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Yellow	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	SFA has selected Perform.com as its Application Service Provider (ASP) solution for the new Performance Development Process.

TO 31- SFA University Front-to-Back

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Anne Teresa

Modernization Partner Contact: Laura Miller

January 31 Assessment	February 23 Assessment	Measure	Comments
Yellow	Green	Overall	Funding for this Task Order was identified on 2/26/01.
Green	Green	Scope	
Yellow	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	The scheduled deliverables and due dates for TO- 31 SFA University Front-to-Back are currently being modified in the task order. The revised schedules have been agreed to by SFAU and will be updated upon award of the modification.
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

TO 58 - Workforce Transition

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Calvin Thomas

Modernization Partner Contact: Linh Nguyen/Amy Rothman

January 31 Assessment	February 23 Assessment	Measure	Comments
Green	Green	Overall	The project is on track to meet the task order requirements.
Green	Green	Scope	
Green	Green	Task Order	The task order is fully funded and targeted to conclude on 3/15/01. The team is currently partnering with Calvin Thomas, SFA HR, and Anne Teresa to draft a task order for follow-on support, given funding is available. The team is working with Jim Lynch, SFA CFO, to determine funding source and availability of funds.
Green	Green	Schedule Performance Against Work Performed	Project is achieving milestones on schedule, with a contracted end date of 3/15/01.
Green	Green	Architecture	
Yellow	Yellow	Risk	Funding for the Employee Development Center (Career Zone) was not in the original FY'01 budget. The team is working closely with SFA CFO (Mary Grace Lintz and Jim Lynch) to determine a potential funding plan for the Employee Development Center.
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this task order.

Scorecard Assessment Criteria

Scorecard Measure/Assessment	Green	Yellow	Red
Overall	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project 	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project 	<ul style="list-style-type: none"> The Overall Assessment is at the discretion of the individuals completing the scorecard No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project
Scope	<ul style="list-style-type: none"> The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner Formal change control process has been implemented and is maintaining control 	<ul style="list-style-type: none"> The scope has been defined and requirements have been documented and authorized by the SFA and Modernization Partner Material scope issues have not been resolved and/or formal change control process has not been implemented 	<ul style="list-style-type: none"> The scope of the Task Order has not been defined and/or requirements are not documented and authorized by the SFA and Modernization Partner Unforeseen scope growth will impact the schedule baseline Change control process has not been implemented or is not maintaining control
Task Order	<ul style="list-style-type: none"> Task Order has been accepted on time per the contract 	<ul style="list-style-type: none"> Task Order has not been awarded but ATP has been issued 	<ul style="list-style-type: none"> No Task Order has been awarded No ATP has been issued
Schedule Performance Against Work Performed	<ul style="list-style-type: none"> Project is achieving milestones on schedule or ahead of schedule 	<ul style="list-style-type: none"> Project may not be meeting milestones, but a catch-up plan has been developed that is accurately reflected in the workplan 	<ul style="list-style-type: none"> Project is not meeting milestones and no catch-up plan has been developed or reflected in the workplan
Architecture	<ul style="list-style-type: none"> The Project is in full compliance with Modernization Blueprint baseline or target architecture standards or An approved change request for all deviations from the approved architecture exists 	<ul style="list-style-type: none"> The Project is deviating from Modernization Blueprint baseline or target architecture standards or A change request has been submitted but the request has not been approved 	<ul style="list-style-type: none"> The Project is deviating from Modernization Blueprint baseline or target architecture standards or A change request has not been submitted and obtained
Risk	<ul style="list-style-type: none"> Potential future risks have been identified and assessed; no impact is expected to the other Measures Project risks (if any) to successfully execute the Task Order have been identified, documented and prioritized Risk mitigation strategies are in place 	<ul style="list-style-type: none"> Potential future risks to other Measures have been identified and assessed; impacts are minimal Project risks to successfully execute the Task Order have been documented, but either: <ul style="list-style-type: none"> Some risks have not been adequately defined or Mitigation strategies have not been developed for all risks 	<ul style="list-style-type: none"> Potential future risks to other Measures have been identified and assessed; impacts are significant Project risks to successfully execute the Task Order have not been documented Mitigation strategies have not been developed
Quality	<ul style="list-style-type: none"> The Project has developed a documented quality plan and is successfully implementing the plan The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order 	<ul style="list-style-type: none"> The Project has developed a documented quality plan, but significant problems are preventing successful implementation of the plan, or The project has complied with the quality requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order, however, one or more significant program plan review issues have not been successfully resolved 	<ul style="list-style-type: none"> The Project has not developed a documented quality plan or The project is not complying with the quality requirements of the Modernization Partner program plan appropriate to the work required by the Task Order
Communication/Change Management	<ul style="list-style-type: none"> Communication and change management strategies are in place and are being implemented 	<ul style="list-style-type: none"> Minor communications issues exist Change management approach and strategy is not complete Information needs of some stakeholders are not being met in a timely manner 	<ul style="list-style-type: none"> Communications issues and change management aspects have not been documented or defined Information needs of stakeholders are not being met
Human Resources	<ul style="list-style-type: none"> Human resource needs have been documented, approved, and the appropriate resources are available Project team has the individual and group skills needed for the particular phase All staffing requests have been filled or have been unfilled for a short time with no impact to schedule 	<ul style="list-style-type: none"> Human resource needs have been documented Some responsibilities are blurred, minor resource gaps exist and/or team lacks some skills to perform successfully, or Unfilled staffing requests have been open for a period of time and have the potential to impact schedule 	<ul style="list-style-type: none"> Human resource needs have not been documented Serious resource deficiencies exist, significant individual and team skills are lacking, or Staffing requests have remained open for an extended period of time and project schedule has been impacted
Commercial Off the Shelf Software (COTS)	<ul style="list-style-type: none"> Significant reuse of hardware, software, data, and/or process is being utilized A Reuse review was conducted during conceptual or detailed design and all reuse issues have been resolved 	<ul style="list-style-type: none"> Reuse of Architecture, Design, Hardware, Software, Data and/or Process was considered, used, and candidates were identified, however, none were selected, or A Reuse review was conducted during conceptual or detailed design and issues remain unresolved 	<ul style="list-style-type: none"> Reuse of Architecture, Design, Hardware, Software, Data and/or Process was not considered and candidates were neither evaluated nor used, or A Reuse review was not conducted during conceptual or detailed design