

**SFA Modernization Partner Program  
Monthly Management Services Summary  
For the Month of March 2001**

April 10, 2001

38.2.3d- MONTHLY MANAGEMENT SERVICES SUMMARY

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**SFA Modernization Partner Program  
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For the Month of March 2001**

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**I. INTRODUCTION**

This report covers the month of March 2001 and includes the following:

- Information on overall project completions/ implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between SFA and Modernization Partner executives to improve the information provided to SFA Executives. We will continue to refine these monthly summaries to improve their usefulness and value. Please provide any suggestions regarding these reports to the SFA Modernization Partner Program Manager ([elisabeth.s.schmidt@accenture.com](mailto:elisabeth.s.schmidt@accenture.com) or 202-651-3640).



## **II. PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD**

This section reports on the completion or implementation of Modernization Partner projects.

### **CIO**

- Completed the Schools Portal version 1.0 and Information for Financial Aid Professionals (IFAP) Conversion project. The Schools Portal is the electronic gateway to all Title IV federal student aid information and resources on the Web.
- Completed development of SFA's Portal Strategy, which provides SFA with an overall portal strategy across the enterprise as well as defining a standard technical architecture for all future portal development efforts. The next phase of work will focus on validating the Portal Strategy recommendations at the VDC. Once validated, SFA IT Management will communicate the Portal Strategy to the entire enterprise.
- Transitioned operation of SFA's Intranet from Modernization Partner to SFA CIO as of 3/30/01. SFA CIO awarded a contract to the new operations provider on 3/29/01.

### **ORGANIZATION TRANSFORMATION**

- Completed the design phase for the Employee Development Center, now known as the Career Zone, which will provide a broad array of services intended to foster professional growth for all SFA staff and take full advantage of the career opportunities created by SFA's ongoing transformation. The Career Zone is "sponsored" by both SFA Human Resources and SFA University for the benefit of the entire organization.

### **PROGRAM MANAGEMENT**

- Achieved acceptance of the Modernization Blueprint, outlining current and future goals of the Modernization Program.
- Achieved acceptance the Target State Vision, which outlines the targets for the Modernization Program for the year 2002 and establishes the vision of where the Modernization Program should be in the year 2004.



### **III. VALUE POINTS**

This section reports value delivered above and beyond the contracted scope of services.

#### **CFO**

- Technical Architecture team identified opportunities to reduce the number of Oracle database/application instances, primarily through consolidation and requirements re-validation, which also eliminates the need for two servers at the VDC. This reduces FMS' existing hardware costs by at least \$48,000 per month.

#### **CIO**

- Converted SFA's MicroStrategy licenses from seat based to server based licenses, which will save SFA over \$500K from future growth/usage.

#### **ORGANIZATION TRANSFORMATION**

- Worked with SFA staff to resolve issues with regard to the build out of the Portals space for the Career Zone. Resolving these issues helps to ensure that the space will be available for the career counselors by 4/6/01.

#### **SCHOOLS**

- Developed and deployed an interim Requirements Management Tool to the COD team. This tool was demonstrated to the Deputy CIO and approved for use by the COD team until the enterprise version of the Rational Requisite Pro software is deployed.

#### **PROGRAM MANAGEMENT**

- Developed a briefing for the SFA Management Council to provide insight into SFA's ability to operate within a flat \$622.2M annual budget from FY2002 to FY2004. The briefing provides analysis comparing projected annual savings per SFA Business Channel/unit against any expected operating budget shortfalls, as well as the target unit costs and level of savings needed to meet the targeted budget figures.
- Nominated SFA Modernization Partner Guaranty Agency (GA) Form 2000 project for the E-Gov 2001 Government Solutions Center and Pioneer Awards. The GA Form 2000 project enabled Guaranty Agencies to complete and submit monthly, quarterly, and annual reports for the FFEL loan program online via one standard web-based form.
- Co-presented Shared-In-Savings with Greg Woods at the Government CIO Council Meeting.



#### **IV. MAJOR PROJECT MILESTONES ACHIEVED**

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis. These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

##### **CFO**

- Passed the Production Readiness Review for FMS Release 3.1, which includes a web-based application form for LEAPP/SLEAPP. FMS Release 3.1 is scheduled to go-live on 4/2/01.
- Obtained approval of the FMS Phase III technical architecture design from SFA IT Security.

##### **CIO**

- Submitted the final version of the SFA Portal Strategy, detailing SFA business requirements and describing the strategy for providing web-based customer services using Portals.
- Submitted the final version of the SFA Portal Product Evaluation and Recommendations, highlighting a detailed analysis of portal tools, architectures, and potential solutions with recommendations to meet the requirements outlined in the Portal Strategy.

##### **FINANCIAL PARTNERS**

- Delivered the FP Data Mart Design deliverable to the Financial Partners Channel for review. The document outlines the required functionality and design for Release 1.0 of the FP Data Mart. This release will contain FFEL historical data that will be used for data modeling, benchmarking, trend analysis, and other financial data reporting.

##### **ORGANIZATION TRANSFORMATION**

- Completed development of the Front 2 Back presenter guide, participant guide, slideshow and game materials for the pilot and completed the audition process for Front 2 Back presenters.
- Presented the Action Plan for Implementation to SFA, describing a proposed Learning Management Solution (LMS) and next steps for acquiring this solution.
- Completed and delivered suggested revisions to the Employee Development Center Design. This document captures suggested changes to the vision/mission, organization structure, and roles/jobs within the Career Zone based on outcomes from the design process and suggestions from stakeholders. The information contained in this document will form the cornerstone for job design, role descriptions, and the required Office of Management Package for the Career Zone.

##### **SCHOOLS**

- Delivered Draft Common Record, which was presented and reviewed by SFA Business Experts and the COD User Community. Feedback was gathered for modification of the record.
- Documented scope definitions for both COD Training and Communication and received approval from Title IV Leadership.



**IV. MAJOR PROJECT MILESTONES ACHIEVED (Continued)**

**STUDENTS**

- Completed and presented the November 2000 Savings calculation for the CDS Simplification Shared-in-Savings project. Met with Dan Hayward (Students Channel), Linda Paulsen (SFA Deputy CFO), Candace Hardesty (SFA CO), and Janet Scott (CO) to discuss. Received acceptance from Dan Hayward (SFA Loan Servicing) and Linda Paulsen (SFA Deputy CFO).
- Completed proposed Technical Architecture Plans for Direct Loan eServicing
- Submitted the FAFSA on the Web Physical/Logical/Application Architecture Diagrams and Marketing Strategy/Plan (Release 5.0, Release 6.0) for review and acceptance.



**V. RISKS AND ISSUES**

This section reports the issues and risks that are currently causing or could potentially cause a very significant impact on the Modernization Partner Program's goals.

<b>Area</b>	<b>Program Management</b>
<b>Description</b>	SFA Budget/19% Unit Cost Reduction Plan
<b>Impact</b>	High
<b>Assistance Requested from SFA</b>	CFO provision of accurate Obligation and Expenditure figures by SFA Channels/business units by year from 1998 to present and projected obligations and expenditures from FY01-FY04.
<b>Proposed Solution/Mitigation Strategy</b>	Work with SFA CFO to develop accurate baseline of figures to develop a savings strategy to help meet budget and cost reduction targets.
<b>Progress/Resolution</b>	Created 19% cost reduction presentation for the Management Council. Presentation outlined projected savings by Channel between FY01-FY04. Also provided input into targeted SFA budgets based on anticipated reductions to generate lower unit costs.



**VI. MONTHLY MODERNIZATION SCORECARDS SUMMARY**

This section presents an extract of all “Red” assessed criteria. The extract is taken from the Monthly Modernization Program Scorecards. (See Appendix VI. for the complete Monthly Modernization Program Scorecards document.)

**No “Red” assessed criteria to report for this period.**