

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

July 10, 2001

38.3.2a- MONTHLY MANAGEMENT SERVICES SUMMARY

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I. INTRODUCTION

This report covers the month of June 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 (eric.l.stackman@accenture.com or 202-651-3659).



II. PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD

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

CFO

- Completed delivery of FMS Release 3.2, which added a web-based Awards Process to the previously delivered LEAPP/SLEAPP (Leveraging Educational Assistance Program and Special Leveraging Educational Assistance Programs) Application Form.

CIO

- Completed the electronic Master Promissory Note (eMPN) project support as scheduled on 6/29/01. This project provides the FFEL community with the ability to utilize an electronic master promissory note as an alternative to the manual paper process.
- Implemented the first releases of the ITA Reusable Common Services (RCS v1.0) architecture, which provides for application development standards for e-mail, exception handling, logging, persistence, and search. RCS v1.0 is the first ITA deployment of a reusable production-ready middleware architecture.



III. VALUE POINTS

This section reports value delivered above and beyond anticipated activities.

CFO

- Demonstrated the new LEAPP/SLEAPP Performance Report at the NASSGAP (National Association of State Student Grant and Aid Programs) conference on 6/12/01.

ORGANIZATION TRANSFORMATION

- Conducted a one-day working session at the Accenture Ideas Exchange with SFA University, Accenture, and PSG employees to discuss SFA University planning for FY02.
- Researched and documented Performance Measurement and Evaluation capabilities best practices for SFA University.
- Developed the SFA University Training Development Methodology.
- Supported SFA Human Resources in formulating FY02 budget estimates.
- Supported Human Resources and CFO in drafting a Workforce Analysis Report in response to request from OMB.

PROGRAM MANAGEMENT

- Developed presentation on Modernization Partner Status Reporting Processes in conjunction with Dr. Bob Jamroz (eCAD Program Management) for the SFA Project Management Workshop.

SCHOOLS

- Coordinated content development and hosted software development meeting.
- Prepared a demonstration of the new web-based Fiscal Operations Report Application to Participate (FISAP) at the National Association for Student Financial Aid Administrators in conjunction with the eCampus Based School Steering Committee Representatives.



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

- Reached an agreement with the Schools Channel on an approach for the COD/FMS interface. The approach supports the FMS web-based draw down available through the Schools Portal.

FINANCIAL PARTNERS

- Completed requirements gathering and submitted the Voluntary Flexible Agreement (VFA) Detailed Design Document. The system will enable Guarantee Agencies with VFAs to integrate with the Financial Management System, measure the performance of the VFA process, and provide data for required congressional reports.

ORGANIZATION TRANSFORMATION

- Defined and delivered high-level functional and technical requirements for the Learning Management System.
- Implemented a process team consisting of SFA University, Accenture and PSG employees to re-design the process for developing Training Courses.
- Completed the Career Zone Advisory Group (Customer Council) Charter.
- Facilitated working session with Human Resources and Financial Partners staff to determine best course of action for reassigning Financial Partners staff who have been impacted by the implementation of the Financial Management System.
- Submitted the Career Zone Performance Plan & Balanced Scorecard.
- Delivered the Human Resources High Priority "As-Is" process flows and Expansion "As-Is" process flows which support the design of the new Human Resources Automation Platform.

PROGRAM MANAGEMENT

- Presented the first iteration of the FY02 Integrated Sequencing Plan to the Management Council.
- Presented the first iteration of the FY02 IT Portfolio to the Management Council.

SCHOOLS

- Completed EAI proof of concept, which successfully transformed DLOS origination, DLOS disbursement, RFMS origination, and RFMS disbursement files into Common Record-formatted XML files. The EAI Proof of Concept demonstrates the ability to translate legacy system transaction data from schools into the Common Record format using MQSeries / EAI software and hardware.
- Completed and presented COD Customer Service Conceptual Design document and migration strategy.
- Completed Design, Development, and Test activities for eCampus Based Iteration #2, which includes web-based functionality to allow Schools and Servicers to submit the FISAP and trigger validation errors to check their data.
- Held a Joint Application Design (JAD) session with the eCampus Based Steering Committee, via web conference, to gather input and determine user satisfaction with Iteration #3 functionality such as Help and Self-Service features, Log-In/Log-Out procedures, and fund reallocation.



STUDENTS

- Completed the re-engineered FAFSA on the Web 5.X on and submitted the application and associated documentation to SFA for review.
- Completed the Customer Requirements documentation and the Functional Specifications for FAFSA on the Web Release 6.0.



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.

- None to Report for this period.



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.)

Task Order	Assessment Criteria	Assessment	Comments
TO 50- Financial Partners Data Mart	Government Dependencies	Red	An application maintenance contract is not in place to support the ongoing maintenance of the FP Data Mart. Either the application maintenance contract or an ATP needs to be implemented immediately to avoid a decrease in service to the users of the FP Data Mart. Additionally, the FP Channel Data Mart workgroup, which consists of representatives from Partner Services and Financial Management, are responsible for informing external Financial Partners of the availability of the Data Mart and determining a strategy for providing access.
TO 77 WO 02- Common Origination and Disbursement	Overall	Red	Modernization Partner is in the process of developing a Shared-In-Savings (SIS) proposal for COD. The team is working on Phase III - Requirements Definition and Implementation Planning. The Requirements Definition phase was originally scheduled to be completed by 4/15/01, but has been extended until 7/31/01. The schedule change is causing considerable risk to the development schedule.