

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

August 10, 2001

38.3.2b- MONTHLY MANAGEMENT SERVICES SUMMARY

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



I. INTRODUCTION

This report covers the month of July 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.

CIO

- Completed the Electronic Master Promissory Note (eMPN) project, which included the planning aspects associated with the eMPN security certification and the associated risk assessment, corrective action plan, security plan, and the accreditation letter that identified the risks.



III. VALUE POINTS

This section reports value delivered above and beyond anticipated activities.

ORGANIZATION TRANSFORMATION

- Facilitated sessions of Student Aid Front 2 Back training, which educates SFA employees and operating partner employees about the student aid process.
- Created a forum to provide coaching and support to Logistics Coordinators and Hosts working on the Front 2 Back course.

PROGRAM MANAGEMENT

- Updated the Legacy Contract Transition Plan for Candace Hardesty (SFA Acquisitions & Contract Performance).
- Refined the FY02 SFA IT Portfolio, which lays out the Modernization effort for FY02.

SCHOOLS

- Designed and distributed eCampus-Based Promotional Flyer for 2001 National Association of Student Financial Aid Administrators (NASFAA) Conference.
- Conducted eCampus-Based presentation at NASFAA to explain the functionality of the on-line FISAP.
- Conducted an Executive Briefing with Greg Woods to demonstrate the eCampus-Based web conference capabilities.



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

- Completed the FMS Release 3.3 System Test and Production Readiness Review (PRR) in support of 8/1/01 go-live. This release includes FMS interfaces for DCS and FFEL, and a web-based performance report for LEAPP/SLEAPP. FMS Release 3.3 also includes the implementation of Oracle Federal Financials multi-organization capability, which facilitates program-based accounting.
- Received approval by OMB for the LEAPP/SLEAPP Performance Report on 7/20/01. The expiration date is 1/31/02.
- LEAPP/SLEAPP Application form approved by OMB on 7/24/01. The expiration date is 7/24/04.

CIO

- Completed contract negotiations with Jamcracker, the Application Service Provider (ASP) Aggregator, as part of the HR Modernization effort. The contract includes 30% savings for SFA on the Jamcracker platform and all support and usage services. The new HR Automation Platform will support SFA's first net-sourced ASP, which will be utilized for Performance Management and will automate SFA's new Performance Development Process (PDP).

FINANCIAL PARTNERS

- Completed draft of FFEL Lender Redesign functional requirements. Completed identification of revised 799 data elements, business rules, and business logic.
- Completed Voluntary Flexible Agreement (VFA) design phase.

ORGANIZATION TRANSFORMATION

- Received acceptance of the SFA Human Capital Plan from the Director of Human Resources. The SFA Human Capital Plan defines SFA's target personnel/staffing needs and an implementation strategy for meeting those needs. The plan represents a work in progress and reflects the best estimates from SFA Senior Leadership of their staffing needs. This document will be used as a resource for SFA leadership and Career Zone sponsors in their continuing efforts to define SFA's long-range human capital plan.
- Completed the Facilitation Support deliverable which was distributed and used at the initial working session on interest based problem solving that was attended by both SFA Human Resources staff and Union representatives.
- Presented the Training Development & Delivery methodology to SFA University stakeholders and received approval to continue with the selection of a pilot training course and develop detailed templates and job aids.



SCHOOLS

- Received OMB approval for the on-line FISAP. The eCampus-Based team worked directly with OMB and submitted an abbreviated clearance package, which resulted in the approval process taking less than one week.
- Finalized COD Interface Requirements and Technical Specifications.
- Received approval of the COD Time Phased Release Plan, which describes the functionality that will be available in each release of the product and when it will be designed, constructed, tested, and fielded.



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 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. The first Go/No-Go Checkpoint was completed on 7/10/01 where a decision was made to go forward. Kay Jacks (SFA Executive Sponsor) identified the COD Transition Team staff members from SFA on 7/17/01.