

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(October 2000)**

Overview

The Program Management Services Achievement Report documents the Modernization Partner's ability to effectively provide Leadership and Direction Setting and to execute the processes and services as prescribed in the Modernization Program Plan.

The Leadership and Direction Setting function includes the following:

- Ensure across the enterprise the integration of the business functions, the application architecture required to support the business functions, the organization, and the Program direction
- Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan, revising as appropriate
- Revise Modernization Blueprint in accordance to the Target State Vision and Integrated Sequencing Plan
- Continue to develop relationships with strategic partners and product vendors to support Program initiatives and provide best in business solutions

In addition, the Modernization Partner leadership team is committed to helping SFA deliver to its milestones documented in the Modernization Blueprint Sequencing Plan, as documented below.

Outcomes Achieved:

The Modernization Partner leadership team has performed these functions as demonstrated below:

- ✓ Integration across the enterprise
 - Continued to coordinate and conduct "Architecting Business Change" meetings bi-weekly to include business and CIO representatives to communicate progress made to date, identify cross-enterprise issues, and provide a forum to exchange ideas on current initiatives as well as other ongoing activities.
 - Continued to generate and distribute the Bi-Weekly Scorecard to document progress made to date, identify issues and impact areas across the enterprise, and communicate to all Modernization team members including the Management Council. The input to produce this report is developed by Modernization Partner and SFA business and technical representatives.
- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan

- Continued to develop the Target State Vision and Integrated Sequencing Plan with the Management Council and other primary stakeholders through individual meetings as well as through the Management Council meetings.
- ✓ Revise Modernization Blueprint
 - Continued to work with the Management Council and other primary stakeholders to incorporate comments provided and to deliver drafts of the Revised Blueprint.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
 - Continued to work with PSG to plan and coordinate the development of the Operating Partner/SFA Scorecards, for which ACS, EDS, and NCS will become the pilot business areas.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - Continued to lead the CDS Retirement team (Andersen Consulting, ACS, AFSA and EDS – all SFA Operating Partners) in the first Federal Government IT share-in-savings effort.
 - Continued to develop relationships with CSC and EDS to participate in the transition of new systems into a production environment (SFA Intranet and FMS Applications Operations).
 - Participated in regular discussions with SFA and CSC regarding restructuring of the VDC contract.
 - Established stronger working relationships with NCS in conjunction with TIVWAN planning. Also assisted SFA CIO staff in obtaining channel leadership attention required for TIVWAN planning.
 - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
 - Initiated planning efforts with key development partners – Beacon and USI – in order to provide enhanced support and cost structures for SFA projects.
 - Conducted meetings with vendors who supply products that are part of the standard architecture, including Interwoven and Viador. These meetings resulted in strengthened relationships among the vendors, SFA and the Modernization Partner, and clearly set expectations of support requirements needed at SFA over the next year.
- ✓ In addition, the leadership team drove the agenda and structure of a CIO Offsite meeting to address the roles and responsibilities of the CIO organization in conjunction with the Modernization Program. The Modernization Partner also provided for a professional facilitator for this meeting.

Key Milestones Delivered

Based on the Modernization Blueprint Sequencing Plan as of 8/31/00 (see Attachment A), the Modernization Partner has been effective in helping SFA achieve the milestones due for completion during the month of October 2000 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of October 2000.]

Nbr	X-Ref	Project	Milestone
M3*	I.A	CRM Requirements Development	GAP Analysis (original due date 9/1/00)
M7*	I.B	Intranet/Content Mgmt	Intranet Dev Conversion & Testing (original due date 9/15/00)
M8*	I.B	Intranet/Content Mgmt	Content Mgmt Processes and Configuration (revised due date 9/22/00)
M19	II.C.1b	CDS Simplification	System Acceptance Test
M30*	I.C	Web Portal	Training and UAT (original due date 9/16/00)
M36	V.A	Enterprise Wide Appraisal System	Deployment of new appraisal system. Actual milestone achieved is identification and selection of new appraisal system. Funding for implementation is pending.
M49*	VII.B	Enterprise IT Architecture	1) Integration Architecture Production Environment Installed and Configured 2) Datawarehousing Architecture Production Environment Installed and Configured (original due date 9/21/00)
M52*	VII.A.1	Ombudsman	Ombudsman Siebel Implementation (original due date 9/30/00)
M53	VII.A.2	Enterprise IT Architecture	Enterprise Architecture Infrastructure Implementation
M55*	I.D	Data Warehouse	CFO Data Mart (original due date 9/30/00)
M59	VI.A.2	FMS – Phase II	Go Live!
M64	IV.E.3	e-Commerce Data Exchange	GA Form 2000 Implementation

The milestones that were scheduled for completion during the months of August, September and October 2000, but were not completed are listed below. As part of deliverable 38.1.4ci *Incentive Fee*, the milestones that were not achieved as planned due to circumstances outside of the control of Modernization Partner will be identified, and the COTR and the Modernization Partner PMO will make the determination to include or reschedule as appropriate, as outlined by the task order.

Nbr	X-Ref	Project	Milestone	Revised Date
M4	I.A	CRM Requirements Development	Solution Development (original due date 10/6/00)	November 2000
M5	I.B	CRM Requirements Development	Final Business Recommendation (original due date 10/20/00)	December 2000
M9	I.B	Intranet/Content Mgmt	Training and UAT Complete (original due date 9/20/00)	November 2000
M10	I.B	Intranet/Content Mgmt	Content Mgmt deployed to Production (original due date 9/30/00)	November 2000

Nbr	X-Ref	Project	Milestone	Revised Date
M15	II.A.1	Enhanced Outreach Services	Implementation (Interaction Associates) (original due date 9/15/00)	November 2000
M21	II.C.1c	e-Servicing	Requirements Defined	TBD - Pending IRB approval
M31	I.C	Web Portal	Application deployed to Production (original due date 9/30/00)	November 2000
M42	I.D	Data Warehouse	Datawarehousing Implementation Business Case (original due date 8/29/00)	Pending rework of deliverable in TO21
M54	I.B	Web Portal	School Portal Release 1.0 (original due date 9/30/00)	November 2000
M56	III.B	IFAP Replatforming	Replatforming Complete (original due date 9/30/00)	November 2000

ATTACHMENT A:
Modernization Blueprint Sequencing Plan
(as of 8/31/00)