

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(November 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
 - Augmented team with resources for the Business Integration (BI) Delivery Team. This team is charged with ensuring that the program is working on the initiatives that will enable SFA to achieve its performance objectives as well as are aligned with the Target State Vision and Integrated Sequencing Plan. In addition, the BI Delivery Team will help integrate initiatives across the enterprise and reflect the best practices of the industry and our operating partners.
 - 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
 - Delivered the Target State Vision and Integrated Sequencing Plan to the Management Council and other primary stakeholders. Once approved, the BI Delivery Team will be responsible for maintaining the Target State Vision and coordinating this document with the Sequencing Plan, the Annual Performance Plan, the Five Year Performance Plan, and other Modernization planning documents.
- ✓ Revise Modernization Blueprint
 - Continued to provide support to produce the final version of the Modernization Blueprint for Greg Woods review.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
 - Established the Performance Management Team, comprised of SFA Team Leads, PSG and Modernization Partner staff to plan and coordinate performance management activities across SFA. Conducted two planning sessions, of which key outcomes included: an integrated roll-out schedule of performance management initiatives, a straw model communication plan to explain changes to SFA staff, and an on-going issues log to be reviewed with senior SFA leadership.
 - Continued to work with PSG to plan and coordinate the development of the Operating Partner/SFA Scorecards.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - 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).
 - 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.
 - Worked with ACS on their standalone proposal to enhance the Delinquency Report distributed via Microstrategy and to estimate costs and capacities based on requirements.
 - Worked with IBM to set up an offsite meeting with IBM, Modernization Partner and SFA CIO leadership at the IBM eGovernment center. Discussion focused around SFA directions and IBM capabilities under the Modernization Program.
 - Worked with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects. Provided Steve Hawald with this arrangement and obtained agreement.
 - Worked with CSC to devise a helpdesk strategy for Technical Operations support that includes relationships with current functional/applications helpdesks. Reviewed this approach with Jim Lynch relative to the expanding scope of the current FMS help desk to include other areas.
 - Coordinate monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
 - Participated in several specific discussions with CSC on revision to the VDC contract, providing advice and perspective from an SFA Modernization Partner perspective.

- Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
 - Developed Best Practices/Point of View CRM document for delivery to Management Council.
 - Worked with IBM to structure a software purchase deal for MQ/Series and Websphere products at a significant cost reduction to SFA. Confirming the benefits to SFA and the Modernization Program before moving forward.
 - Worked with Microstrategy to structure a software purchase deal for expanded capacity for work scheduled in FY01 (Financial Partners DataMart, CFO Activity Based DataMart, ACS Enhancements to Delinquency Report distribution).
 - Continue to communicate Modernization Program initiatives with individual vendors – Viador, Autonomy and Interwoven - which will utilize their technologies
- ✓ Overall Leadership and Direction Setting activities included:
 - Chaired the DSG and integrated the efforts of the Target State Vision, the Integrated Sequencing Plan, the Modernization Blueprint and program funding around agreed upon priorities.
 - Obtained Management Council consensus on the top priorities for SFA modernization in FY01
 - Supported SFA Transition Team planning
 - Supported management team at EAC's in Dallas and Atlanta
 - Reviewed and provided feedback on drafts of SFA Performance Plans
 - Supported presentation of SFA's budget planning priorities to the Department of Education.

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 November 2000 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of November 2000.]

Nbr	X-Ref	Project	Milestone
M4*	I.A	CRM Requirements Development	Solution Development (original due date 10/6/00)
M9*	I.B	Intranet/Content Mgmt	Training and UAT Complete (original due date 9/20/00)
M10*	I.B	Intranet/Content Mgmt	Content Mgmt deployed to Production (original due date 9/30/00)
M15*	II.A.1	Enhanced Outreach Services	Implementation (Interaction Associates) (original due date 9/15/00)
M20	II.C.1.b	CDS Simplification	CDS – Go Live
M57	I.D.	Data Warehouse	CDS DataMart

The milestones that were scheduled for completion during the months of August, September, October, and November 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
M5	I.B	CRM Requirements Development	Final Business Recommendation (original due date 10/20/00)	January 10, 2001
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)	TBD – resolving integration and testing problems
M38		SFA University	SFA Core Curriculum deployed to all SFA employees	March 2001 (pending TO Mod)
M42	I.D	Data Warehouse	Datawarehousing Implementation Business Case (original due date 8/29/00)	December 15, 2000
M54	I.B	Web Portal	School Portal Release 1.0 (original due date 9/30/00)	TBD – resolving integration and testing problems
M56	III.B	IFAP Replatforming	Replatforming Complete (original due date 9/30/00)	TBD – resolving integration and testing problems

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