

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

May 10, 2001

38.2.3e- MONTHLY MANAGEMENT SERVICES SUMMARY

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**SFA Modernization Partner Program
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I. INTRODUCTION

This report covers the month of April 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

- Implemented Financial Management System (FMS) Release II on 4/2/01, which allows LEAPP/SLEAPP applications to be completed and submitted online. States and territories can now use web-based forms to apply for funding under the LEAPP/SLEAPP programs. Fifty-three agencies are using the system and thirteen have already submitted applications online. Once the Financial Partners Channel approves the form, the office calculates the award based on appropriation amounts and distributes the awards. By electronically submitting the form, the new process will improve cash management, improve the accuracy of data, and reduce the amount of manual data entry. The online submission also serves as a repository for the application data (application Form 1288) and provides online reports of LEAPP and SLEAPP program data.

FINANCIAL PARTNERS

- Completed the Federal Family Education Loan (FFEL) System Retirement Analysis effort and received acceptance of the Executive Report of the FFEL Retirement System Analysis on 4/19/01 from the Financial Partners senior management. FFEL System Retirement Analysis project has worked to prepare for the retirement of the Financial Partner components of the existing FFEL system as well as the transfer of required FFEL functionality to more modern SFA systems such as FMS and enhanced Debt Collection Systems. The Lender Payment Redesign/FFEL Retirement Phase II task order is currently being developed.



III. VALUE POINTS

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

CFO

- Received the E-Gov 2001 Government Solutions Center and Pioneer Award for the SFA Modernization Partner Guaranty Agency (GA) Form 2000 project, which was delivered as part of FMS Phase II. 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. Accenture played a key role in assisting SFA in securing this award.

ORGANIZATION TRANSFORMATION

- Conducted SFA University visit to Accenture training facility in St. Charles, IL to share best practices on corporate universities, training services, human performance and corporate culture.
- Created Fact Sheets on various human resources topics for SFA executive leadership focusing on the enterprise wide employee transition effort.
- Supported SFA HR Director in a day long briefing with the Union regarding SFA human resource programs including the Performance Development Process (PDP), Scorecard, Career Zone, and Employee Transition.

PROGRAM MANAGEMENT

- Provided detailed briefing points on the Shared-In-Savings model to the SFA Management Council and members of Congress.
- Continued to provide analysis and support to the SFA CIO on SFA's ability to operate within a flat \$622.2M annual budget from FY2002 to FY2004.
- CDS Retirement was named a finalist for the Business Solutions in Public Interest award competition. This award is granted by the Council for Excellence in Government and Accenture played a key role in assisting SFA in securing this award.
- Arranged interviews with First Union and Bank of America executives for the GAO team investigating SFA's use of middleware. Additionally, arranged for IBM to provide GAO with a half-day overview of MQSeries.
- Presented on the SFA Modernization effort and the Target State Vision at the NASFAA Board of Directors meeting.
- Presented to the Council of CIOs at FOCE on the Shared-In-Savings CDS Retirement project.
- Working with United States Congressional Committee providing briefings, materials, and thought leadership used to develop Shared-In-Savings legislation.

SCHOOLS

- Used PresentPlus, a web-based presentation system that allows participants to listen to live audio, view presentation materials, communicate using a "chat" feature, and submit feedback via a polling and reporting tool, for the eCampus Based JAD sessions. Participants stated that the product was a highly effective means for conducting the sessions.
- Assisted in the development of handout materials on the Campus Based systems to be used at the NASFAA conference to communicate project goals to schools and institutions.



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.

FINANCIAL PARTNERS

- Completed the design of the Financial Partners Data Mart and developed the programs to extract the required Guaranty Agency (GA) and Lender information from the FFEL system.

ORGANIZATION TRANSFORMATION

- Completed development of the Front 2 Back Presenter Guide, Participant Guide, slideshow, and game and selected Presenters, Logistics Coordinators, and Logistics Hosts.
- Facilitated Front 2 Back pilots in Washington, D.C. and Chicago, IL and collected feedback.
- Presented Career Zone storyboard to Union and gained Union support to continue with staff focus groups and first phase of communication plan.
- Completed the Career Zone Campaign Plan, which was developed in partnership with SFA communications, to outline the communications and marketing efforts for the rollout of the Career Zone.

PMO

- Obtained final SFA acceptance of the Target State Vision.
- Presented the 19% Savings Plan at the Management Council offsite.
- Worked to shape five Shared-In-Savings deals: COD, TIV/WAN, FARS, Consistent Answers, and eServicing.
- Worked to shape Shared-In-Savings umbrella Task Order, which will enable SFA to execute multiple Shared-In-Savings deals concurrently.

SCHOOLS

- Reviewed the COD Customer Service conceptual design and high-level Common Record with Pell and Direct Loans.
- Conducted Joint Application Development (JAD) Session Kick-off with Campus Based Staff and a geographically disbursed group of schools who volunteered to participate in the design of the eCampus Based System.

STUDENTS

- Completed the eServicing High Level Requirements and Design for Internet Billing, Online Correspondence and eCRM initiatives.
- Completed set-up of the new performance/load test environment for FAFSA on the Web Redesign. The new performance/load test environment will allow the FAFSA on the Web Redesign team to test the performance of the new application at different capacity levels. This will provide SFA with greater assurances as to the application's ability to handle varying levels of activity when it is moved into production.
- Obtained SFA acceptance of the FAFSA on the Web Marketing Strategy/Plan Release 5.0 and Marketing Strategy/Plan Release 6.0 documents. These documents identify specific marketing initiatives that could be implemented to improve the usage levels of the FAFSA on the Web application.
- Obtained SFA acceptance of "FAFSA Release 5.x Requirements" document. The requirements document represents a single, centralized document from which application design, build, and testing will be based.



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.

Area	CFO
Description	The Department of Education Deputy CFO issued a recommendation to the Management Improvement Team that the Department of Education consolidate all of the Department's accounting operations under one installation of the Oracle Financials run by the department.
Impact	Significant impact in meeting current FMS Release schedule; including integration with FMSS, GAPS and SFA Channels. Adds significant risk to FMS activities in support of COD and FFEL Lender Redesign.
Assistance Requested from SFA	SFA and Modernization Partner are working together to address the issues raised.
Proposed Solution/Mitigation Strategy	The FMS team is working with SFA CFO to craft a response to the Department of Education request to consolidate FMS with FMSS.
Progress/Resolution	The Response was forwarded to Greg Woods by COB 5/01/01. It is planned to be submitted to Management Improvement Team for consideration.

Area	CIO
Description	SFA has not budget to fund the operational components of some existing Modernization Partner projects such as the EAI Implementation and ITA Release 2.
Impact	Funding will be needed to provide ongoing support to modernization projects.
Assistance Requested from SFA	Insure that the Management Council is aware of the need to fund the operational components of existing modernization projects.
Proposed Solution/Mitigation Strategy	Modernization Partner will identify all potential funding gaps and work with Harry Feely (SFA Deputy CIO) to resolve this issue.
Progress/Resolution	Modernization Partner is in the process of identifying and documenting all potential funding gaps.



V. RISKS AND ISSUES (Continued)

Area	Organization Transformation
Description	Union has expressed concerns regarding the policies and procedures for employee transition.
Impact	Full implementation of the Career Zone cannot take place until the Union's concerns are resolved. At this time the Career Zone team is continuing planning and communications, but cannot begin implementation.
Assistance Requested from SFA	Establish agreement with Union regarding the policies and procedures for employee transition as soon as possible.
Proposed Solution/Mitigation Strategy	Human Resources and business leaders will develop ongoing partnership and working sessions with Union leadership to resolve transition concerns. Several meetings took place 4/25/01 - 4/27/01 but the employee transition issue has not been resolved. Additional meetings have been scheduled for the beginning of May.
Progress/Resolution	SFA HR and the Union are currently drafting an agreement which is expected to be finalized by mid-May.

Area	Students
Description	As of 4/30/01 there is a 3 week delay in the development schedule for FAFA On The Web Redesign (v.5.X) and scope is undefined for the Student Access functionality.
Impact	The delay in the development schedule impacts subsequent activities by NCS, primarily System Test. Student Access functionality is delayed.
Assistance Requested from SFA	Approval on the Corrective Action Plan presented to SFA on 4/30/01; a detailed project plan is being developed on that basis. Facilitation of a rapid review of Student Access functionality with NCS to enable the Modernization Partner to estimate schedule and cost impact to SFA.
Proposed Solution/Mitigation Strategy	Modernization Partner has developed a corrective action plan to recover the 3 week delay by 6/30/01. As part of this mitigation, the corrective action plan has implemented 4 additional developers.
Progress/Resolution	The Modernization Partner team met with the Students Channel and NCS on 4/30/01 to present the Corrective Action Plan and obtain feedback. A follow-on meeting with NCS is scheduled for 5/7/01 to resolve schedule related impacts and understand the Student Access functionality. The objective is to work in close association with SFA to deliver functionality needed by SFA's Student Channel customers.



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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.