

**US Department of Education  
Student Financial Assistance (SFA)  
Modernization Partner Program  
Management Services Achievement Report  
(March 2001)**

---

**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 use the draft Target State Vision diagram as the basis for communicating SFA's integration strategy to Modernization teams. Met with several teams to explain the Target State Vision diagram and help apply it to their efforts, including the eCampus Based development team; the GAO review team; several members of the CIO organization at the request of Wayne Wright; and the SFA CIO team responsible for creating the web-based SFA "Roadmap" for Steve Hawald.
  - Brought the Target State Vision perspective to several design team meetings, including the NSLDS off-site, the Data Architecture off-site, and the CIO off-site meetings.
  - Began work to advance SFA's strategy for creating an integrated school identification strategy for use by modernized SFA systems.

- Modernization Partner ITRs continued to work with the GMs to coordinate efforts across the Modernization Partner teams focused on each of the SFA PBO Victory List items.
- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan
  - Achieved SFA management concurrence on the Target State Vision diagrams, including sign-off by all seven Management Council members.
  - Continued to update and revise the Integrated Sequencing Plan in line with the current FY01 PBO Victory List Initiatives.
  - Continued to develop the FY02 Modernization Menu (Investment Strategy) and drafted the FY02 Investment Process which will help the DSG, IRB, and business units make decisions on projects for the next fiscal year.
- ✓ Revise Modernization Blueprint
  - Delivered a final version of the Modernization Blueprint to SFA for posting on its intranet.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
  - Partnered with Public Strategies Group (PSG) to formulate the approach and workplan for implementing team-based scorecards through SFA, inclusive of Operating Partners.
  - Established CDS Savings Calculation process to be used by SFA, legacy contractors, and Modernization Partner to quantify savings resulting from the CDS project.
  - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
    - Worked with ACS to help develop an approach for presenting the reduced operating costs associated with Share-in-Savings projects
    - Finalized agreements with IBM for the buildout of the EAI core MQSeries services to support COD.
    - Continued to work with KPMG in conjunction with SFA Operating Partners to support the eSign initiative.
    - Continued to develop relationships with CSC and EDS in the operation of production applications (SFA Intranet, IFAP/Schools Portal, and FMS Phase II).
    - Continued to work with NCS and KPMG, and began involving CSC, in TIVWAN planning activities.
    - Continued working with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects.
    - Coordinated monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
  - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
    - Selected Beacon Technologies to support the reengineering of campus-based as an eCommerce solution. Beacon is a recognized supplier of eCommerce solutions to private sector clients.
    - 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:
  - Supported SFA efforts to work with review teams from the Education Inspector General and the GAO who are looking at SFA's Modernization Program. Conducted a

Modernization Partner Overview meeting with SFA Leadership, the GAO team, and Accenture leadership. Also assisted GAO with arranging interviews regarding use of middleware at First Union, Chase Manhattan and the Customs Service.

- Completed and submitted an application for FORM 2000 to the e-GOV 2001 Pioneer Award Committee.
- Assisted SFA with preparing a Modernization Briefing Chart for Greg Woods to present to Secretary Paige. Accenture contributions to the presentation were based on materials prepared for the Modernization Overview meeting with the GAO.
- Continued to chair 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.
- Assisted the DSG and IRB by facilitating the refinement of Modernization business cases and their presentation to the IRB for funding allocation.
- Assisted the SFA CFO develop an operational savings plan to achieve the COO's goal of a 19% reduction in unit costs by FY2004.
- Continued to support SFA Transition Team planning
- Developed briefing describing the SFA Share-in-Savings best practices for presentation at the March 21 CIO Council meeting.
- Organized briefing with Assistive Technology representatives to provide insight and guidance on DA508 regulations to all Modernization Partner Managers.
- The Modernization Partner participated in the development and delivery of SFA's Process Improvement Initiative Kickoff meeting conducted on March 26, 2001. Mod Partner will also actively participate on the CMM Executive Steering Committee, which will shape the direction of the Software Acquisition Process Group who is chartered to deploy the CMM Process Improvement Program across SFA.

### 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 March 2001 as listed below. [The milestones noted with an asterisk (\*) were rescheduled for completion during the month of March 2001.]

<b>Nbr</b>	<b>X-Ref</b>	<b>Project</b>	<b>Milestone</b>
M31*	I.C	Web Portal	Application deployed to Production (original due date 9/30/00)
M54*	I.B	Web Portal	School Portal Release 1.0 (original due date 9/30/00)
M56*	III.B	IFAP Replatforming	Replatforming Complete (original due date 9/30/00)

The milestones that were scheduled for completion during the months of September 2000 through March 2001, but were not completed are listed below with the revised completion date identified.

<b>Nbr</b>	<b>X-Ref</b>	<b>Project</b>	<b>Milestone</b>	<b>Revised Date</b>
M21	II.C.1c	e-Servicing	Requirements Defined (original due date 9/23/00)	April 2, 2001
M22	II.C.1c	e-Servicing	Complete Design (original due date 12/31/00)	April 2, 2001
M38		SFA University	SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00)	June and July 2001 (pending TO Mod)
M39	V.B	Integrated Human Resource System	Initial HRIS requirements assessment completed (original due date 3/30/01)	May 18, 2001 pending task order award

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