

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(April 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
 - Completed and achieved SFA acceptance of the Target State Vision diagrams, and continue to use them 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 Management Council, the Senior Leadership Team, and the Operating Partners (Quarterly meeting).
 - Continued work to advance SFA's strategy for creating an integrated school identification strategy for use by modernized SFA systems. Delivered a briefing on the approach to the COD Steering Committee, which was well-received/accepted. Will continue to move forward and explore the feasibility of the ideas presented in the briefing.

- 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.
 - 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 in March 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
 - Continued to partner with Public Strategies Group (PSG) to rollout team-based scorecards through SFA, inclusive of Operating Partners.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - 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 (IFAP/Schools Portal, FMS Phase II, ITA Release 1, and Ombudsman).
 - Continued to work with NCS, CSC and KPMG in TIVWAN planning activities.
 - Continued to work with ACS in developing share-in-savings deal for FARS retirement.
 - Continued to work with NCS and Macro for transition of FAFSA on the Web (FOTW) version 5.x to NCS for development of version 6.0.
 - 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:
 - 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:
 - Worked with SFA CFO, Department of Education General Counsel, and Contracts and Acquisitions to develop a new framework for obligations of funds and shared-in-savings arrangements.
 - Briefed Senator Lieberman’s staff as part of the Government Affairs Committee on shared-in-savings models.
 - Continue to refine and stabilize the CDS Savings Calculation process to be used by SFA, legacy contractors, and Modernization Partner to quantify savings resulting from the CDS project, specifically for the months of December 2000 and January 2001. In

addition, Mod Partner is developing a repeatable process to establish and confirm baselines for subsequent share-in-savings deals.

- Augmented COD management team with Accenture senior executive, providing additional industry expertise and delivery experience.
 - Assisted in the negotiation of early legacy system retirement of RFMS and DLOS.
 - Received approval from Deputy Secretary of Education for PIN site use by FFEL standards.
 - Continued to support SFA efforts to work with review teams from the Education Inspector General and the GAO who are looking at SFA's Modernization Program.
 - 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.
 - Continued to assist the DSG and IRB by facilitating the refinement of Modernization business cases and their presentation to the IRB for funding allocation.
 - Continued to support 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
 - Conducted a best practices visit with SFA University and the Department's Training and Development Center (TDC) to Accenture's corporate university in St. Charles, Illinois.
 - Developed briefing describing the SFA Share-in-Savings best practices for presentation at the March 21 CIO Council meeting.
- ✓ Other achievements:
- FORMS 2000 was one of twenty winners of the e-GOV 2001 Pioneer Award as a result of Mod Partner submitting its nomination.
 - CDS Simplification is a finalist for the "Business Solutions in the Public Interest" Federal Acquisition Award as a result of Mod Partner submitting its nomination.

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

Nbr	X-Ref	Project	Milestone
M21*	I.C.1c	e-Servicing	Requirements Defined (original due date 9/23/00)
M22*	I.C.1c	e-Servicing	Complete Design (original due date 12/31/00)

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

Nbr	X-Ref	Project	Milestone	Revised Date
M38		SFA University	SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00)	July 31, 2001
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)