

FFEL Retirement IPT Team Charter

Core Working Team*	Expanded Team*	Expanded Team*	Information Sharing Team
Reggie Ewing, IPT Manager	John Reeves	David Moore	Jennifer Douglas
Frank Ramos	Johan Bos-Beijer	Adele Gabrielli	Kay Jacks
Anna Allen	Tom Skelly	Shirley Wheeler	John Kane
Denise Merchant	Catherine Power	Chris Ward	Brian Siegel
Mark Polanskas	Quang Nguyen	Red Feldman	Lorenzo Rasetti
Cynthia Heath	Gary Hopkins	Sham Pai	Katrina Turner
Brian Sullivan**	Wayne Wright	Constance Herron	Jack Reynolds
Kriss Ethridge	Paul Stonner	Andy Ngassa	Cameron Ishaq
Mike Rockis	David Elliot	Ted Strange	
Pam Eliadis	Andy Boots	Lin Sheffield	
Jim Menard	Bob Jamroz		

*SMEs will be added to team as necessary.

**Unit Manager identified as placeholder.

Objective and Purpose:

OBJECTIVE:

The objective of the FFEL System Retirement project is to identify, inventory, analyze and prioritize critical functional components of the FFEL system in order to replace some or all of those components. Ultimately the goal is for SFA to retire the existing FFEL system and transfer required FFEL functionality to more modern SFA systems (e.g. FMS, Portals, Data Mart, enhanced Debt Collections System, etc.):

- FP Channel components of FFEL including the Lender and Schools system, GA system and Support Services systems are to be transferred no later than November 1, 2001.
- Debt Management and Collections System (DMCS) functionality and other components that are the responsibility of the Students Channel may be reengineered in the future.

PURPOSE:

- Identify all components of the FFEL system that have current or future transfer/replacement capability.
- Complete a detailed analysis of the FFEL functionality, technology and business operations.
- Complete an inventory of all the component parts of the FFEL system (inclusive of non-FP channel related sub systems and targets).
- List specific systems, functions, correlating links, ownership (by channel(s) or business units), active or deactivated function, replacement alignment and dependencies.
- Provide a recommendation for transporting functionality and/or data where ownership or functionality is not clear.
- Functions that have been migrated to other systems or will be in the course of development work in CFO and/or other areas will be detailed as part of the inventory.
- Business (Cost Benefit Analysis) and Risk assessment will be completed that will provide the FP channel with considerations and mitigation options for the identified work.
- Produce a detailed de-conversion workplan identifying the actions to be taken, the functional areas, the impacted system(s) and alignment requirements with co-existing projects/IPTs.
- The retirement process will ensure compliance by the current contractor for their obligations under the existing contract and operative extensions/modifications.
- The scope of the present project task order is limited to analysis, inventory and risk assessment of the FFEL system and does not include actual de-conversion or implementation of any technical or functional solution.
- Provide integration and coding requirements for continuation of FFEL functionality, or conversion requirements necessary to ensure the continued operational systems support for the FP channel.
- Quantify cost benefits from retiring the FFEL system, for which a contract extension ends September 2001.

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Goals	Key Success Indicators
Lower costs by eliminating the expenses associated with manual processing, production, and maintenance of the FFEL system.	Overall costs will be reduced - helping to achieve one of SFA's major goals - to reduce unit costs. Customer (internal and external) satisfaction by improved consolidated systems and employee satisfaction by lowering maintenance and processing oversight.
Provide communication to team members and other members of the channels to keep all parties informed of issues and how FFEL retirement will affect their work and related modernization projects.	Critical impacted audiences will be aware of initiative issues and understand how they are impacted.
Develop deliverables with Subject Matter Experts from each of the functional areas in order to ensure accuracy and an ability to benefit in future business applications.	Key outcomes of Analysis phase are thorough and complete.
Identify best in business practices and technology for implementing the De-conversion.	Valid, traceable, and repeatable processes are defined which should reduce errors during implementation.

Four Major Tasks:			
Tasks	Description	Target Completion Date	Responsible Party
IPT Project Charter	This effort involves creating the IPT structure to support all phases of the FFEL System Retirement project. Activities such as organizing the team, conducting a kick-off, establishing key meetings, and finalizing the plans for the first phase of work will occur at this stage.	December 22, 2000	Reggie Ewing
Analysis and Inventory	This work effort involves assessing the requirements for retiring some or all components of the FFEL system. This will include the creation of a detailed inventory of the components and processes of the FFEL system as well as identifying other systems and processes to support required FFEL functionality.	February 16, 2001	Reggie Ewing
Business and Risk Assessment	During this stage, the team will identify risks, mitigation plans, and the costs and benefits associated with retiring FP FFEL system functionality and processing.	February 28, 2001	Reggie Ewing
De-conversion Work Plan	This segment of work involves determining the plan and schedule for retiring the components of the existing FFEL system that are the responsibility of the FP Channel. This work will be highly integrated with efforts to migrate FFEL functionality to FMS.	March 30, 2001	Reggie Ewing

In-Project Scope	Out of Project Scope
Retirement of FFEL functionality that is the responsibility of the FP channel.	Retirement of FFEL Functionality that is NOT the responsibility of the FP channel.

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Tentative Task List for Analysis Phase:

Week of December 18 – December 22, 2000:

- Gather Key Documents
- Raytheon, MP, FP, Students, FMS
- Inventory Key Documents
- Begin Analysis process
- Begin Planning/Scheduling Analysis
- IPT Launch Meeting Follow Up Items
- Update Meeting Schedule
 - Update IPT Charter
 - Update Team Roster
 - Update Task List

Week of January 2 – January 5, 2001:

- Identify Key FFEL Subsystems
- Analyze Key Documents
- Conduct Key 1 on 1's to confirm FFEL Subsystems
- Develop Templates for Key Outcomes
- Describe Key Functions
- Document/Draft Process Maps

Week of January 8 – January 12, 2001:

- Emphasis on Inventory of GA System
- Hold Core Team Working Session (1/10)
- Review Key Subsystem Inventory
 - Review Draft Process Maps
 - Review Status/Issues Log
- Continue to Draft Process Maps and Description Sheets
- Conduct 1 on 1's – Inventory of GA
- Analyze Additional Key Documents

Week of January 15 – January 19, 2001:

- Emphasis on Inventory of GA and Lender Systems
- Hold IPT Checkpoint Meeting (1/17)
- Review Inventory List
 - Review Process Maps
 - Review Process Map Description Sheets
- Draft Inventory Spreadsheet
- Draft a template for Business Assessment
- Finalize Process Maps
- Continue Analyzing Documents
- Conduct Key 1 on 1's – Inventory of GA and Lender Systems

Week of January 22 – January 26, 2001:

- Emphasis on Inventory of Lender and DMCS
- Hold Core Team Working Session (1/24)
- Review Draft Inventory
 - Review Draft Process Maps
 - Review Status/Issues Log
- Conduct Key 1 on 1's – Inventory of Lender and DMCS

Week of January 29 – February 2, 2001:

- Emphasis on Inventory of DMCS and Support Services
- Hold Core Team Working Session (1/31)
- Review Draft Inventory
 - Review Draft Process Maps
 - Review Status/Issues Log
- Conduct 1 on 1's – Inventory DMCS and Support Services
- Begin Work on Business Assessment

Week of February 5 – February 9, 2001:

- Emphasis on Inventory of Support Services
- Hold Core Team Working Session (2/7)
- Review Draft Inventory
 - Review Draft Process Maps
 - Review Status/Issues Log
- Conduct 1 on 1's – Inventory of Support Services
- Continue work on Business Assessment

Week of February 12 – February 16, 2001:

- Emphasis on Completing Inventory
- Hold IPT Checkpoint Meeting (2/14)
- Review Final Inventory
 - Review Final Process Maps
 - Review Final Process Map Description Sheets
 - Review Status/Issues Log
- Continue Work on Business Assessment

Week of February 19 – February 23, 2001:

- Emphasis on Business Assessment
- Hold Core Team Working Session (2/21)
- Review Draft Business Assessment
 - Review Status/Issues Log
- Conduct key 1 on 1's – Business Assessment
- Begin work on De-conversion Work Plan

Week of February 26 – March 2, 2001:

- Emphasis on Completing Business Assessment
- Hold IPT Checkpoint Meeting (2/28)
- Review Final Business Assessment
 - Review Status/Issues Log
- Continue work on De-conversion Work Plan

Week of March 5 – March 9, 2001:

- Emphasis on Work Planning
- Hold Core Team Working Session (3/7)
- Review Draft Work Plan
 - Review Status/Issues Log
- Conduct Key 1 on 1's - Work Planning

Week of March 12 – March 16, 2001:

- Emphasis on Work Planning
- Hold IPT Checkpoint Meeting (3/14)
- Review Draft Work Plan
 - Review Status/Issues Log
- Conduct Key 1 on 1's – Work Planning

Week of March 19 – March 23:

- Emphasis on Work Planning
- Hold Core Team Working Session (3/21)
- Review Draft Work Plan
 - Review Status/Issues Log
- Conduct Key 1 on 1's - Work Planning

Week of March 26 – March 28, 2001:

- Emphasis on completing Work Planning
- Hold IPT Checkpoint Meeting (3/28)
- Review Final De-conversion Work Plan

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Core Working Team Roster:

Organization	Function/Owner	Representative	Telephone	Email
Mod Partner	IPT Manager	Reginald Ewing	202.651.3676	Reginald.K.Ewing@accenture.com
Financial Partners	Process Owner SME	Frank Ramos	202.205.3799	Frank_Ramos@ed.gov
Financial Partners	Contract Management	Anna Allen	202.708.8770	Anna_Allen@ed.gov
CFO/FMS	FMS	Cynthia Heath	202.401.0612	Cynthia_Heath@ed.gov
eCAD	Development Support	Mark Polanskas	202.260.3665	Mark_Polanskas@ed.gov
eCAD	COD Project	Denise Merchant	202.260.6751	Denise_Merchant@ed.gov
IT Services	NSLDS	Pam Eliadis	202.260.6638	Pam_Eliadis@ed.gov
Raytheon Systems	FFEL Program Manager	Kriss Ethridge	703.289.1304	Kethridge@fallschurch.esys.com
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Students Channel	DCS Systems Director	Brian Sullivan	202.708.9199	Brian_Sullivan@ed.gov
Mod Partner	IPT Consultant	Jim Menard	202.651.3699	James.L.Menard@accenture.com

Expanded Team Roster:

Organization	Function/Owner	Representative	Telephone	Email
Financial Partners	General Manager	John Reeves	202.260.9715	John_Reeves@ed.gov
Financial Partners	Deputy GM	Johan Bos-Beijer	202.708.8231	Johan_BosBeijer@ed.gov
Financial Partners	Technical Consultant	Ted Strange	202.205.9872	Theodore_Strange@ed.gov
ECAD	Development Support	Bob Jamroz	202.708.7452	Bob_Jamroz@ed.gov
IT Services	VDC (CSC)	Catherine Power	202.260.2453	Catherine_Power@ed.gov
IT Services	Application Hosting	David Moore	202.708.9778	David_Moore@ed.gov
IT Services	Computer Specialists	David Elliott	202.401.0551	David_Elliott@ed.gov
SFA/CFO	Accounting	Quang Nguyen	202.708.5731	Quang_Nguyen@ed.gov
SFA/CIO	IT Services	Lin Sheffield	202.708.8802	Lin_Sheffield@ed.gov
ED/CFO	User	Tom Skelly	202.401.0287	Thomas_Skelly@ed.gov
Students Channel	Acting Collections Director	Gary Hopkins	202.205.2880	Gary_Hopkins@ed.gov
Students Channel	Debt Collection Systems	Adele Gabrielli	202.708.4779	Adele_Gabrielli@ed.gov
Students Channel	Debt Collection Systems	Shirley Wheeler	202.708.9956	Shirley_Wheeler@ed.gov
IT Management	Enterprise Arch.	Wayne Wright	202.257.5080	Wayne_Wright@ed.gov
IT Management	Security	Andy Boots	202.260.8636	Andy_Boots@ed.gov
CFO/FMS	FMS/Sub-Ledger	Paul Stonner	202.401.7536	Paul_Stonner@ed.gov
Mod Partner	Financial Partners	Chris Ward	202.651.3680	Christopher.L.Ward@accenture.com
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Mod Partner	CIO/Data Warehouse	Sham Pai	202.651.3827	Sham.Pai@accenture.com

Information Sharing Team Roster:

Organization	Function/Owner	Representative	Telephone	Email
Financial Partners	Program Development	Jack Reynolds	202.401.7818	Jack_Reynolds@ed.gov
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Financial Partners	State Agency Liaison	Cameron Ishaq	202.2605076	Cameron_Ishaq@ed.gov
Students Channel	General Manager	Jennifer Douglas	202.708.9951	Jennifer_Douglas@ed.gov
Schools Channel	General Manager	Kay Jacks	202.708.6040	Kay_Jacks@ed.gov
ED/OUS	Budget Services	John Kane	202.401.1859	John_Kane@ed.gov
OGC	Legal Counsel	Brian Siegel	202.401.8302	Brian_Siegel@ed.gov
OMB		Lorenzo Rasetti		Lorenzo_Rasetti@omb.eop.gov

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Meeting Schedule:			
Meeting	Date	Time	Location
IPT Launch	December 15, 2000	10:30 a.m.	ROB 3, 4027
Core Team Working Session	January 10, 2001	2 p.m.	ROB 3, 4009 number 3
IPT Checkpoint	January 17, 2001	2 p.m.	ROB 3, 4027
Core Team Working Session	January 24, 2001	2 p.m.	ROB 3, 4009 number 3
Core Team Working Session	January 31, 2001	2 p.m.	ROB 3, 4009 number 3
Core Team Working Session	February 7, 2001	2 p.m.	ROB 3, 4009 number 3
IPT Checkpoint	February 14, 2001	2 p.m.	ROB 3, 4027
Core Team Working Session	February 21, 2001	2 p.m.	ROB 3, 4009 number 3
IPT Checkpoint	February 28, 2001	2 p.m.	ROB 3, 4027
Core Team Working Session	March 7, 2001	2 p.m.	ROB 3, 4009 number 3
IPT Checkpoint	March 14, 2001	2 p.m.	ROB 3, 4027
Core Team Working Session	March 21, 2001	2 p.m.	ROB 3, 4009 number 3
IPT Checkpoint	March 28, 2001	2 p.m.	ROB 3, 4027