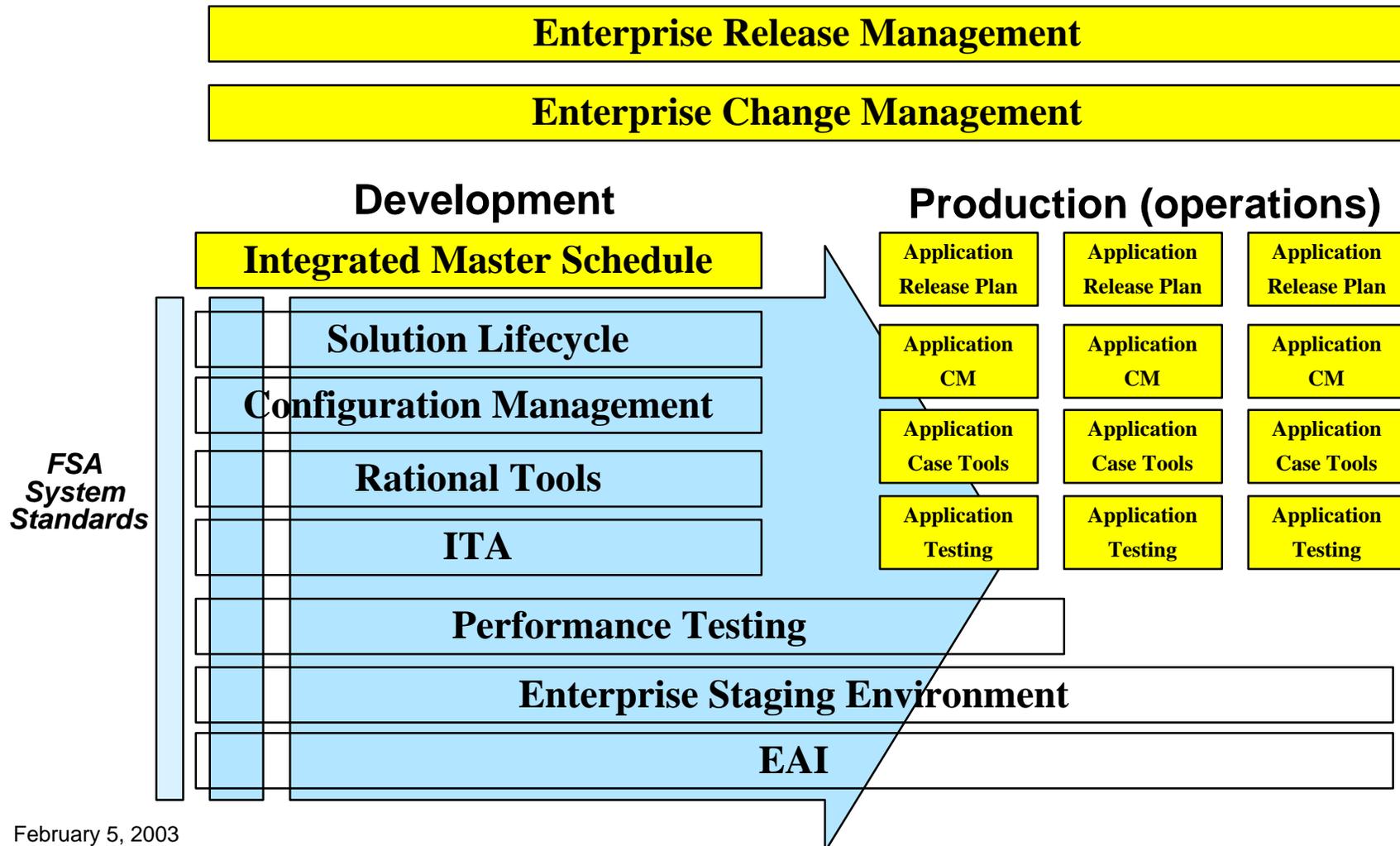




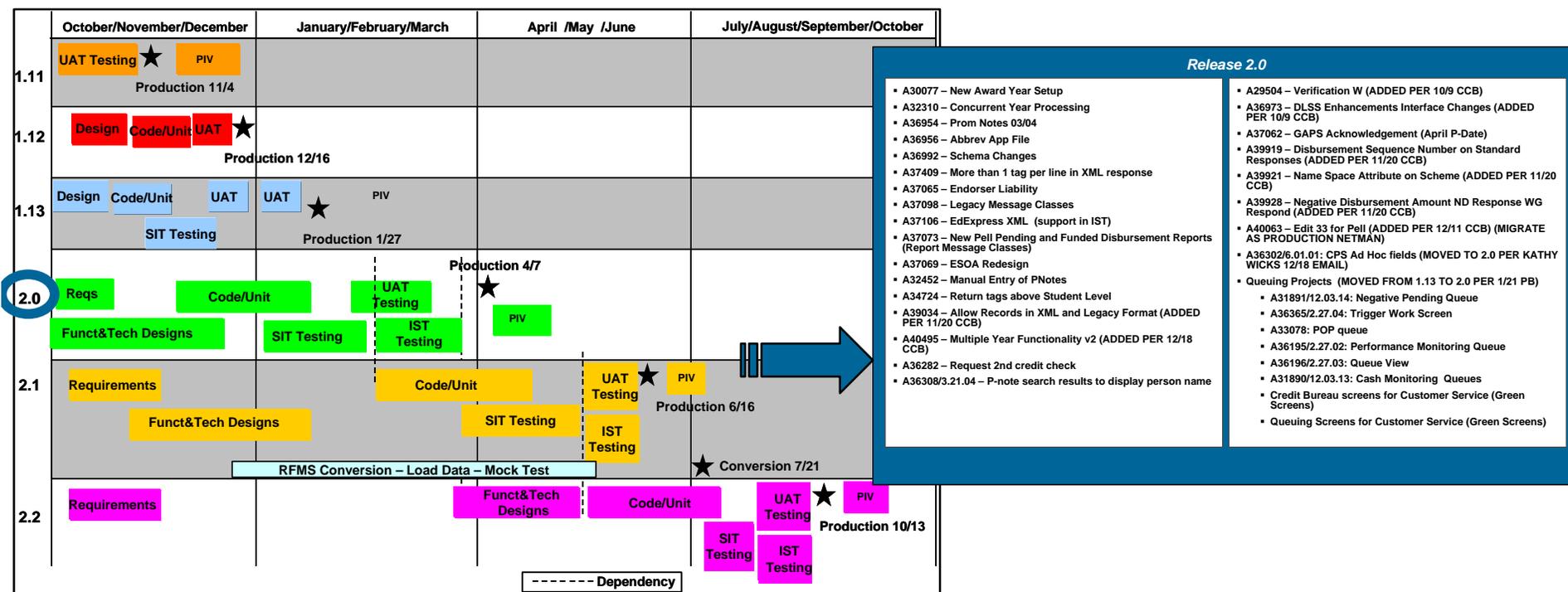
Enterprise View – Pulling everything together





Application level - Integrated Schedules build on what FSA is doing well

Release Management – Today, most production application teams do a good job of managing change at the project level. Applications do a very good job of bundling changes efforts into a controlled release schedule and keep affected stakeholders informed via phone or e-mail, such as the COD release schedule below:



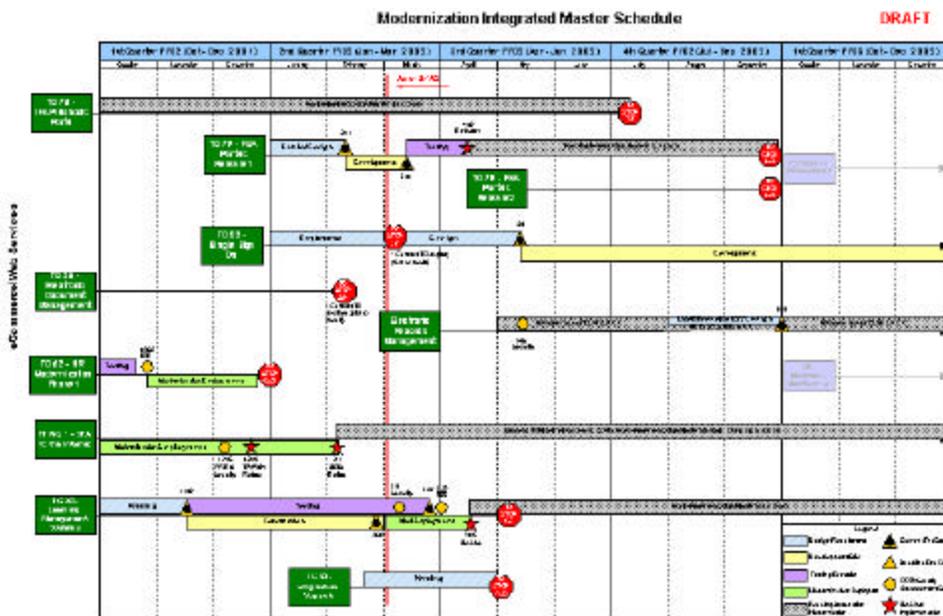
COD also has 3 change control sessions a week with “Trading Partners” (other applications that interface or use COD Data). These CCB sessions review all production changes introduced outside of the Release windows, and emergency changes introduced by COD. Trading partners may identify scheduled changes with their application or conflicts the proposed change would have on their system. The CCRB process (10-60 minutes) is not facilitated by automated tools, or distributed reports.



Enterprise Release Management

FSA and IP developed an integrated master schedule to summarize most of the new development efforts, managed by IP into a consolidated view. This report is reviewed by IP leadership. Integration issues are noted for ITR resolution. While useful this is not a complete view of system development across the enterprise, no operating partner efforts included. Integration details, such as Business process, data or interface dependencies are not captured and monitored as part of the process.

- **Release Management**
 - FSA's overall release management plan is driven by business priorities
 - Release efforts occur at the application/ project level
- **Integrated Master Schedule for Modernization**
 - Plan and coordinate all development and release efforts across IP
 - ITR's work with projects to manage implementation efforts and resolve dependency issues
 - A summary view of the release schedule is reviewed by IP leads and updated every 2 weeks





The next step – capture all release and production planning meetings across FSA

- *Release Management Today:*
 - Application development teams conduct planning sessions for release into production (Micro and Macro) See Spreadsheet next slide.
 - Operating Partner application teams conduct planning sessions, Production control meeting and release planning meetings and invite affected stakeholder areas
 - Data Centers conduct weekly production planning meetings and conduct internal CCRB review sessions
- There are gaps however we need to address
 - There are no release meetings occur across data centers.
 - There are no release meetings that coordinate all activity across all affected stakeholder groups.
 - Issues and action items from the many “stove-piped” meetings are not managed and controlled to closure in a common way or available online in a common repository.
 - Information is lost or not shared with affected parties consistently
 - Working together with the Channels we can improve and streamline the current activity and reduce overall effort required to manage change and coordinate release activity

The next step – capture all release and production planning meetings across FSA



Release Management Today: Below is a representative sample of the application release planning sessions which occur across the portfolio today. More detailed analysis of the current session is planned for the next phase of work, and separate excel sheet is attached.

Application portfolio	VDC Production Operations Meeting	VDC Development Operations Meeting	COD Production Call with Trading Partners	COD CR Meetings	COD / PELL Meeting	COD / DLOS Meeting	CPS Production Meeting
	Weekly Thursday 2 pm (1 hour)	Weekly Tuesday 9 am (45 minutes)	Daily 9:00 am - 9:45 am	Weekly Thursday 10:00 am (45 minutes)	Weekly Thursday 11:00 am (45 minutes)	Weekly Thursday 2:00 pm (45 minutes)	Weekly Tuesday 10:00 am (45 minutes)
Notes:							
Schools Channel							
1. IFAP	X						
2. Schools Portal	X	X					
3. eCB	X						
4. EZ Audit		X					
5. PEPS							
6. DLOS						X	
7. LO Web						X	
8. Loan Consolidation						X	
9. COD			X	X	X	X	
Students Channel							
1. PIN Site	X	X					X
2. FA FSA	X	X					X
3. CPS	X						X
4. Students Portal	X						
5. SAIG				X	X	X	
6. Students.gov	X						
7. DLSS							
8. CM DataMart (also CFO)	X						
9. NSLDS							
10. Eservicing							
Financial Partners							
1. FP Portal	X						
2. FP DataMart	X						
3. Lender Redesign (LARS)	X						
4. Delinquency Loan Mart	X						
5. FFEL							
6. FMS							
Other (TBD)							
1. EAI (CIO)	X	X	X	X	X	X	X
2. ITA (CIO)	X	X					X
3. FMS (CFO)	X						
4. Rational Support Team (CIO)	X						
5. Program Guidance DB (Schools?)							
6. FSA Net (CIO) (FSA TO THE INTERNET)	X						
7. Intranet (CIO)							
8. Ombudsman	X						
9. Xacta		X			X		
10. ED Express		X					
Data Center							
VDC	X	X	X	X	X	X	X
TSYS			X	X	X	X	
ACS						X	
Resources							
Average Contractors	15	8	5	4	2	2	6
Average FSA	10	8	3	2	2	2	3
Average Data Center	15	8	3	4	2	2	5
Total Resource Attendance (AVG)	40	21	13	10	6	6	14



Enterprise Why change ?

Current State:

FSA has quickly migrated from a mainframe based portfolio to hybrid of web base, mid range and Mainframe solutions.... However the change process, release management process and configuration control process has remained the same...

- The change management process for all non mainframe solutions at the VDC are Manual.
- The process is cumbersome, introduces a large degree of risk, and requires a very intense hand-off of the code migration change process to production
- Changes are not always conclusively inter system tested in a simulated production environment, so problems happen
- Applications which used to have batch feeds or manual input now get data from web solutions or the EAI “Bus” in real time... the new integration efforts have significantly increased complexity from system interdependency. The operations infrastructure has not kept pace and is falling further behind
- ECM has dramatically improved the manual process through documentation, training and tools, and successfully provided teams full visibility to nearly all proposed changes.... but more work needs to be done to integrate across the enterprise.

FSA is and has been moving in the right direction for Release management and application owners are doing a great job mitigating their risks. The efforts, however are stove piped and often the critical players are not involved, because they are not involved.



Enterprise Release Management Why change ?

Business practices FSA has put in place to avoid the risks of the current state:

- FSA has introduced a moratorium or "freeze" on all code changes at the VDC for 2 weeks during FASFA peak. This "freeze" eliminates most system outage risks to the FASFA application by simply shutting down all change activity for any application effort during this time. This is a reasonable business practice given the current state of configuration management, but not a "Best Practice". ERM and Configuration management would help to address this practice and enable FSA to allow changes to applications which clearly do not impact FASFA code processing or hardware.
- FSA also "freezes" all change during sponsored conferences. It eliminates the risk by shutting down all possible errors introduced by change, but also creates delay and significant backlog which slows the change process for several weeks once the "freeze" is lifted.

While these practices do reduce overall risk to vital business applications they prevent needed changes for other applications. A release plan would enable application and channels to review and identify critical dependencies and minimize