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Section 1 Introduction

Solution Life Cycle (SLC) Configuration Management (CM) Deployment builds on the FSA investments made recently in the development and deployment of the SLC CM Process Guide. The purpose of CM Deployment is to build awareness, understanding and buy-in of the need to conduct CM activities at the project level in accordance with the guidelines set forth in the CM Process Guide.

CM Deployment supports the Modernization project teams to optimize the planning and performance of CM activities. To accomplish these objectives, the CM Deployment team developed coaching session/peer review guidelines, content, and job aids, which are contained in the CM Deployment Module and deployed them to selected Modernization projects.

The following reports document coaching session meetings held with selected Modernization projects.



Section 2 Electronic Audited Financial Statements (EAFS)

Project Name and Task Order Number

Electronic Audited Financial Statements (EAFS) – TO 86

Meeting Date

January 14, 2002

Meeting Number

1-86-A

List of Attendees

Name	Role	Affiliation	E-Mail
Queen, Cheryl	CIO	FSA	Cheryl.Queen@ed.gov
Hough, Valerie	EASF - IV&V Liaison	FSA	Valerie.Hough@ed.gov
Murphy, Gene	EAFS Project Manager	Mod Partner	Gene.F.Murphy@accenture.com
Langkamp, Ron	ECMI Project Manager	Mod Partner	J. Ronald Langkamp@accenture.com
Dragnic, Maja	EASF Project Member	Mod Partner	Maja.Dragnic@accenture.com
Hughes, Bill	ECMI Project Member	Mod Partner	Bill M. Hughes@accenture.com
Jarboe, Steve	ECMI Project Member	Mod Partner	Steve.Jarboe@accenture.com
Jones, Jen	SLC Deployment	Mod Partner	Jennifer E. Jones@accenture.com
Morse, Robert	ECMI Project Member	Mod Partner	Robert Morse@accenture.com
Sinclair, Seth	EASF Project Member	Mod Partner	Seth B.Sinclair@accenture.com

Goals of the Meeting

- Introduce the personnel from EASF, both from the Federal Student Aid (FSA) and Modernization Partner, and the ECMI team
- Provide an overview of Configuration Management (CM) in accordance with the FSA Solution Life Cycle (SLC) and CM Process Guides
- Introduce the ECMI effort and its mission at the project level
- Enable the project CM Lead to begin their CM Plan
- Provide CM reference materials to EASF Team

Key Discussion Points

As an introduction, the ECMI effort was placed in the context of existing initiatives at FSA and Mod Partner, such as the FSA Quality Assurance program including the Independent Verification & Validation (IV&V); Quality Performance Improvement (QPI); and SLC Deployment.

The present status of Enterprise-level CM Implementation efforts at FSA was summarized. FSA has an informal set of escalation procedures that depend on the type of project issue. A goal of ECMI is to formalize these procedures during fiscal year 2002.

Time was spent reviewing the SLC CM Process Guide to assist the project to begin its CM Plan.



**CM Deployment Status Report
Appendix A - Project Coaching Session Reports**

One question that was addressed is how the different quality assurance reviews and checklists coordinate with each other, i.e. whether it is possible to do one CM Plan and one set of activities that satisfies them all. This result falls within one of the goals of ECMI Project CM: to make the project's CM activities more efficient.

Action Items

Items Description	Person Responsible	Completion Date	Comments
Identify a Project CM Lead	Gene Murphy	1/28/02	Seth Sinclair?
Begin writing the project CM Plan	CM Lead (TBD)		
Contact the ECMI team to schedule a "coaching session"	CM Lead (TBD)		
Schedule a follow-up peer review to assess EASF progress on their CM.	Robert Morse	2/18/02	Date flexible

Documents Distribution List

- Meeting Agenda
- First Steps to CM Planning
- CM Orientation Presentation
- SLC Process Guide
- CM Process Guide
- SLC Project CM Peer Review Questionnaire



Section 2 E-Campus Based Services

Meeting#: 2-70-B
 Project: e-Campus Based TO# 70
 Date: January 22, 2002
 Time: 10:00 – 11:30 AM
 Location: Conference Room #487, 830 UCP Lower Level

List of Attendees

Name	Role	Affiliation	E-Mail
Carrie Marks	ECB Project Manager	Mod Partner	Carrie S. Marks@accenture.com
Jarboe, Steve	ECB CM Lead	Mod Partner	Steve.Jarboe@accenture.com
Hughes, Bill	ECMI Project Member	Mod Partner	Bill M. Hughes@accenture.com
Morse, Robert	ECMI Project Member	Mod Partner	Robert Morse@accenture.com

1. Goals of the Meeting

Goal	Goal Attained?
Determine status of CM on Project	Yes

2. Questions and Discussion

Questions Posed	Answers Provided
How does your approach to CM help us prepare for the CM reviews (IV&V) & QPI?	Our questionnaire is designed to include items that address both IV&V and QPI type questions.

3. Action Items

Item Description	Person Responsible	Completion Date	Comments
Review of ECB CM Plan	Robert Morse	1/23/01	Excellent – complete with detailed procedures.
Completion of ECMI questionnaire	Steve Jarboe	1/24/02	See enclosed document.



4. Documents Distributed in Hard Copy

Document Name	Electronic Location:
Meeting Agenda	Sent by e-mail
CM Orientation Presentation	TBD
First Steps to CM Planning	Sent by e-mail
CM Recommended Folder Directory	TBD
SLC Process Guide	Mod Partner: X-Drive/SLC Tools or Knowledge Library (e-Project) FSA: TBD
CM Process Guide	Mod Partner: X-Drive/SLC Tools or Knowledge Library (e-Project) FSA: TBD
SLC Project CM Peer Review Questionnaire	Sent by e-mail

5. Completed Questionnaire



"eCB questionnaire 01
25 02.xls"



Section 3 Portal Roll-out Plan

Meeting Report

Meeting#: 3-79-A
 Project: Portal Rollout Plan TO 79
 Date: January 29, 2002
 Time: 10:30-11:30 AM
 Location: Conference Room # 404, UCP 830 Lower Level

List of Attendees

Name	Role	Affiliation	E-Mail
Jacqueline Dufort	Portal Rollout Plan Project Manager	Mod Partner	Jacqueline A. Dufort@accenture.com
Erick Middleton	Portal Rollout Plan Team Member	Mod Partner	Erick C. Middleton@accenture.com
Bill Hughes	ECMI Project Member	Mod Partner	Bill M. Hughes@accenture.com
Steve Jarboe	ECMI Project Member	Mod Partner	Steve.Jarboe@accenture.com
Robert Morse	ECMI Project Member	Mod Partner	Robert Morse@accenture.com

6. Goals of the Meeting

Goal	Goal Attained?
Enable Project CM Lead to begin CM Planning	Yes
Determine status of CM on Project	Yes

7. Questions and Discussion

Questions Posed	Answers Provided
How much will the CM effort cost?	It is important not to underestimate what planning and performing CM will cost. It takes about ten hours to develop an initial CM Plan.
How do ECMI, FSA Q/A, and QPI differ?	FSA's Q/A IV&V review checks for evidence (e.g. documents) that SLC CM requirements are met. QPI is an Accenture process-oriented initiative that concentrates on projects compliance with CMMI standards. ECMI takes a supportive and integrative approach to assist projects in optimizing the efficiency of their CM activities including preparation for the other reviews.



8. Action Items

Item Description	Person Responsible	Completion Date	Comments
Send QPI CM Plan Template & Sample Completed CM Plan to Jacqueline, cc: Erick	Steve Jarboe	1/29/02	
Send IV&V Checklists to Jacqueline, cc: Erick	Robert Morse	1/29/02	Sent entire FSA Q/A Handbook including IV&V checklist.
Provide estimating information on CM to Project	Steve Jarboe		
Determine who is Project CM Lead	Jacqueline Dufort		

9. Project Questionnaire



"Portal Rollout Plan
Questionnaire 01 29 02"



Section 4 Financial Partners Datamart

Meeting Report

Meeting#: 4-68-A
 Project: Financial Partners Data Mart Releases 2 & 3
 Date: February 6, 2002
 Time: 10:00-11:00 AM
 Location: Conference Room 404, 830 UCP Lower Level

List of Attendees

Name	Role	Affiliation	E-Mail
Willie Sutton	System Security	FSA	Willie.Sutton@ed.gov
Brenda Ware	System Security	FSA	Brenda.Ware@ed.gov
Michael Paige	Q/A IV&V Reviews	FSA	mpage@bscsys.com
Nancy Krecklow	Project Manager	Mod Partner	Nancy A. Krecklow@accenture.com
Steve Jarboe	ECMI Project Support	Mod Partner	Steven R. Jarboe@accenture.com
Robert Morse	ECMI Project Support	Mod Partner	Robert Morse@accenture.com

10. Goals of the Meeting

Goal	Goal Attained?
Establish working relationship between FP Data Mart and ECMI Teams	Yes
Determine status of CM on Project	Yes



**CM Deployment Status Report
Appendix A - Project Coaching Session Reports**

11. Questions and Discussion

Questions Posed	Answers Provided
Who should the CM Lead be?	CM Lead is appointed by the Project Manager and should be someone with enough time to do the CM Plan and perform the CM activities. No technical expertise is required.
Who should serve on the Change Control Group (CCG)?	The answer depends on the size and complexity of the project. The key is that all affected groups be represented. For a particular project the CCG may include the Executive Sponsor, FSA Project Lead, Mod Partner Project Manager, End-User representative, Project CIO Representative, System Security Officer, Quality Assurance Lead, Development Lead, and/or Documentation Lead.
Who appoints the members of the CCG?	Generally, the FSA Project Lead and the Mod Partner Project Manager do this jointly.

12. Action Items

Item Description	Person Responsible	Expected Completion Date	Comments
Name project CM Lead	Nancy Krecklow	By March 1, 2002	
Draft project CM Plan	CM Lead (TBD)	By March 1, 2002	
Form CCG	Nancy Krecklow	By March 1, 2002	
Contact the ECMI team to schedule a “coaching session”	CM Lead (TBD)		If desired.
Schedule a follow-up peer review to assess EASF progress on their CM.	Robert Morse	March 7	Date flexible



Section 5 Financial Management Systems (FMS)



"ECMI-FMS
OCWG_Parking Lot_A



Section 6 ITA Release 3

Meeting Report

Meeting#: 8-69-A
 Project: Integrated Technical Architecture (ITA) Team
 Date: February 21, 2002
 Time: 1:00-2:00 PM
 Location: Conference Room 432, 830 UCP Lower Level

List of Attendees

Name	Role	Affiliation	E-Mail
Wayne Cheng	ITA Manager (designee)	Mod Partner	Wayne.Chang@Accenture
William Brownlow	ITA CM Lead	Mod Partner	William.G.Brownlow@Accenture
Francis Tang	FSA Quality Assurance	FSA	Francis.Tang@ed.gov
Robert Morse	ECMI Project Support	Mod Partner	Robert.morse@accenture.com
Steve Jarboe	ECMI – Meeting Facilitator	Mod Partner	Steven R. Jarboe@accenture.com

13. Goals of the Meeting

Goal	Goal Attained?
Establish working relationship between ITA and ECMI Support Team	Yes
Determine status of CM on Project	Yes
Discuss & understand ITA Team’s CM Priorities	Yes



14. Questions and Discussion

Questions Posed	Answers Provided
What relationship between the ECMI and ITA team would best suit the ITA team's needs?	As ITA CM practices are well established, the ECMI team could be most helpful by facilitating the coordination of ITA's involvement in Clear Case rollouts. This will be done in addition to standard ECMI Coaching and Peer Review program.

15. Action Items

Item Description	Person Responsible	Expected Completion Date	Comments
Send the ITA team the FSA QA Handbook (Checklists). – The handbook is undergoing revision and will be updated soon	Robert Morse	February 21, 2002	
Review and be prepared to answer CM questions contained in the ECMI questionnaire	William Brownlow	March 21, 2002	
Contact the ITA team to schedule a follow-up "coaching session"	Steve Jarboe	March 7, 2002	