

**U.S. Department of Education  
Federal Student Aid (FSA)  
Modernization Partner Program  
Enterprise Change Management (ECM)  
Task Order Technical Proposal**

**Overview**

The Enterprise Change Management solution (ECM) has been successfully rolled out to the majority of Production Application support teams and all modernization efforts Across FSA. Several components of the FSA ECM solution have been successfully implemented, but need continued support to ensure the complete rollout is successful and the value is realized for FSA. The purpose of this task order is to fully deploy and enable the ECM solution across remaining support areas:

- Application Development efforts (Modernization)
- Applications moved into production Environments
- Legacy Production Support
- Support the GCAR integration effort with ECM
- VDC (for VDC Generated Change Requests)
- Support change coordination efforts across Modernization
- Application Teams using Data Centers outside the VDC

ECM Support effort covers:

- Initial set-up of users on the system,
- Training conducted for the ECM solution (tool and process),
- Enhancement of the tool (Release 3.0) based on approved in scope changes
- Periodic updates to the process guide.

The ECM support team will also work with CIO to develop a release management approach via the ECM tool capability in the tool.

**Goals**

The purpose of this task is to realize the value of the ECM capability. As such, the objectives that will be achieved by this initiative are:

- Full FSA awareness, buy-in, and participation in the ECM process.
- Enterprise compliance with ECM principles.

Specifically, this initiative will deliver the following:

- Development and execution of an Implementation Plan for ECM.
- Support and rollout of ECM Release 3.0 tool and process updates.
- Transition of the asset library support process to a designated CIO resource.
- Support of Enterprise CCG meetings as needed.

## **Scope**

The FSA Configuration Management implementation support effort will fully deploy ECM processes across the FSA enterprise. This effort will provide resources to support the full deployment of the Enterprise Change Management tool across all remaining data center and application areas. The team will also support periodic meetings of the Enterprise Change Control Group across FSA. Every 2 months, a Bi-monthly Progress Report will be completed summarizing activity defined below.

- Provide full support of the Enterprise Change Management tool across FSA.
- Revise the deployment plan to deploy the ECM tool across all remaining areas (New Development and Production Planning and Support).
- Improved the ECM executive measurement and reporting capabilities.
- Support FSA Project Manager with the institutionalization of the ECM effort across FSA.
- Update the ECM process and tool user guide to align with the Virtual Data Center (VDC) GCAR integration effort once complete and readied for production.
- Support the project based configuration management review process
- Support FSA CIO lead in the management of the FSA Enterprise Level Change Control Group escalation process.
- Identify ongoing requirements.
- Plan for future efforts.

Supporting work products such as process guides, awareness training materials, and supporting job-aids are updated will be included in the bi-monthly reports.

## **Deliverables**

Deliverables 90.1.1a through 90.1.1c will be bi-monthly reports summarizing team activity. Each report will identify the objectives, accomplishments, measurements, observations, and recommendations for the period.

### Work Products:

- Progress Reports.
- Updated measurements.
- ECM Release 3.0 implementation updates to affected ECM support materials.

### **90.1.1a Progress Report – November/December 2002**

ECM Progress Report Summary:

- Summary of ECM results.
- Revised implementation plan with updated measurements.
- ECCG minutes and action items (if conducted)
- Summary of project-based Configuration Management reviews.

*Desired Level of Performance:* The plan will be developed in accordance with SLC formats. The Progress Report will adhere to the FSA approved Progress Report Template.

*Quality Level:* Drafts of documents have undergone a review by FSA and results incorporated. Final documents delivered on time and approved by the FSA Deputy CIO (eCAD), or designated representative.

*Delivery:* 01/09/03

**90.1.1b Progress Report – January/February 2003**

ECM Progress Report Summary:

- Draft recommendations on use of ECM tool to support Enterprise Release Management efforts.
- Summary of ECM results.
- ECCG minutes and action items (if conducted)
- Summary of project-based Configuration Management reviews.
- Approved list of Release 3.0 enhancements for the ECM tool.

*Desired Level of Performance:* The Progress Report will adhere to the FSA approved Progress Report Template.

*Quality Level:* Drafts of documents have undergone a review by FSA and results incorporated. Final documents delivered on time and approved by the FSA Deputy CIO (eCAD), or designated representative.

*Delivery:* 03/07/03

**90.1.1c Progress Report – March/April 2003**

ECM Progress Report Summary:

- Summary of ECM results.
- ECCG minutes and action items (if conducted)
- Summary of project-based Configuration Management reviews.
- Updated ECM process documentation and user Guide incorporating ECM Release 3.0 enhancements.
- Training summary on Release 3.0 roll out effort.

*Desired Level of Performance:* The Progress Report will adhere to the FSA approved Progress Report Template.

*Quality Level:* Drafts of documents have undergone a review by FSA and results incorporated. Final documents delivered on time and approved by the FSA Deputy CIO (eCAD), or designated representative.

*Delivery:* 05/07/03

**Deliverables, Acceptance Criteria, and Milestones**

<b>Number</b>	<b>Deliverable</b>	<b>Acceptance Criteria</b>	<b>Due DAC</b>
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Number	Deliverable	Acceptance Criteria	Due DAC
<b>Phase I</b>			
90.1.1a	Progress Report – November-December 2002	Document which reports objectives, accomplishments, measurements, observations, and recommendations. Included documents are: <ul style="list-style-type: none"> <li>• Updated ECM Deployment Plan</li> <li>• Summary of ECM results</li> <li>• Summary of project-based Configuration Management Reviews</li> <li>• Transitioned Asset Library process to an FSA resource</li> </ul>	01/08/03
90.1.1b	Progress Report - January-February 2003	Document which reports objectives, accomplishments, measurements, observations, and recommendations. Included documents are: <ul style="list-style-type: none"> <li>• Summary of ECM results</li> <li>• Summary of project-based Configuration Management Reviews.</li> <li>• Summary report of approved Release 3.0 Enhancements.</li> </ul>	03/07/03
90.1.1c	Progress Report - March – April 2003	Document which reports objectives, accomplishments, measurements, observations, and recommendations. Included documents are: <ul style="list-style-type: none"> <li>• Summary of ECM results</li> <li>• Summary of project-based Configuration Management reviews.</li> <li>• Updated ECM process documentation and User Guide incorporating ECM Release 3.0 enhancements.</li> <li>• Training summary on Release 3.0 roll out effort.</li> </ul>	05/07/03

**Assumptions**

1. The Modernization Partner will create work products, with the support of various members of the FSA organization. Only the final collection of documents will be considered a task order deliverable.
2. Support of the GCAR integration effort is limited to 4 workdays per deliverable. Additional support may affect deliverables specified in this task order and will be modified at request of FSA and agreed.
3. Tools (other than simple Excel spreadsheets) for the tracking of action items, documents, issues, etc., are not within the scope of this task order.
4. FSA will designate the Asset library process owner by 11/30/02.

5. Related efforts of release management, helpdesk, lifecycle processes (such as design and code standards, migration procedures to production, testing), and design and build of processes or procedures for these efforts are not included in the scope of this task order.
6. The Progress Report Template used will be current ECM report template in place. Future changes or modifications to the Progress Report Template will also be reviewed and approved by the Executive Sponsor.
7. Invoicing will be Firm Fixed Price based on the price of each deliverable. Deliverables will be invoiced upon acceptance and according to the Price Summary page in the enclosed Price Proposal.
8. FSA will identify the ECCG lead that the Modernization teams will support in the establishment of the ECCG. The lead will be responsible for scheduling and conduct of the ECCG meetings and work with Operating Partners to designate appropriate technical representatives to attend scheduled meetings.
9. FSA shall have 14 days from receipt of each deliverable to review and provide comments or questions to the Modernization Partner. If the deliverable substantially meets the acceptance criteria, then the deliverable shall be approved for payment. If the deliverable contains material errors or omissions, then the Modernization Partner shall have 7 days to correct and resubmit the deliverable, and FSA shall have an additional 7 days to review the revised deliverable. The Modernization Partner will promptly use commercially reasonable efforts to correct errors in each deliverable.
10. Travel estimate is based on the GFY2002 Federal Travel Regulations. We have estimated the number of employees on full-time travel for an overall travel cost, divided the overall cost by the total number of hours to be worked, then distributed the travel estimate to each deliverable proportionally by number of hours per deliverable.