



**F E D E R A L
S T U D E N T A I D**

We Help Put America Through School

Operating Partner Enterprise Change Management (ECM) Tool Pilot Final Review Session (updated)

Operating Partner Pilot Participants

Operating Partner Pilot Success Criteria Review

Next Steps - Operating Partner Roll-out

Pilot Participant Feedback and Recommendations

Executive Review Open Discussion and Consensus Building

Operating Partner Pilot Conclusion

August 26, 2002



Operating Partner Pilot Participants

Pilot Participants (Respective ECM Core Groups)

Application Team Group

- Jeanne Saunders*
- Nina Colon*
- Ida Mondragon*
- Mike Cline*
- Bill Schulte*
- Matt Kain
- Patrick Dominy
- Sandy Weldon

Data Center Group

- Dave Lass*
- Gary Adams*
- Mike Healy*
- Nancy Mathisen
- Carol Greer

ECM Support Team

- Bruce Bruning
- Steve Jarboe
- Robert Morse
- Brian Vincent

Enterprise Stakeholder Group

- Mike Fillinich*
- Charlie Coleman*
- Keith Wilson*
- Neil Sattler*
- Lana Gourdine*
- Phillip Wynn*
- Slawko Semaszczuk*
- John Hsu*
- Robert O'Keefe*
- Ron Langkamp*

* Executive Review Committee Members



Operating Partner Pilot Success Criteria

The ECM team is confident the first 6 Success criterion have been met, and have brief supporting slides to confirm. We are looking for Pilot participant feedback to ensure the pilot effort has been successful and to confirm we should proceed with formal roll out of the ECM tool across the FSA's Operating Partners.

Finally, we are seeking executive team approval to proceed...

The Operating Partner Pilot Success Criteria:

- 1. Change Request (CR) information contained in the Tool can be used by FSA as “the data of record” for discussing and acting on change management activity**
- 2. Tool facilitates improved CR coordination across the VDC and Operating Partner Teams**
- 3. Timeliness of CR resolution is consistent or improved for Pilot teams**
- 4. Visibility to the data is sufficient to manage CR activity for the Pilot Teams**
- 5. Pilot Participants understand and buy-in to the purpose & objective of the CR process and supporting Tool**
- 6. Pilot Participants’ feedback is incorporated into ongoing Pilot improvement efforts**
- 7. Executive Committee evaluates Pilot activity and reaches consensus to proceed**

Let's briefly review the above success criteria in more detail....



Operating Partner Pilot Success Criteria Detail

1) ECM can be the “Data of Record” for FSA Change Management efforts:

Teams are exclusively using the ECM tool in place of Word Documents, emails and Tracking Spreadsheets

To date, over 120 Change Requests (CR) have been entered into the ECM Tool across the enterprise. ECM has been the “Data of Record” for all of these change requests. The operating partner pilot teams have logged 20 CRs to date (11 were self-initiated, 9 were submitted by other application Teams but identified FSAFSA PIN Site or CPS as “other Systems Affected”).

MS Word Template

Electronic ECM tool



2) ECM facilitates improved CR coordination across the VDC and Operating Partner Teams:

VDC Service Delivery Managers (SDM) are using ECM reports in weekly status review meetings with the application teams to keep apprised of progress. ECM also generates automated E-Mail notification of change requests from other applications, which potentially affect the operating partner applications.

ECM Tool Reports

Email Notifications

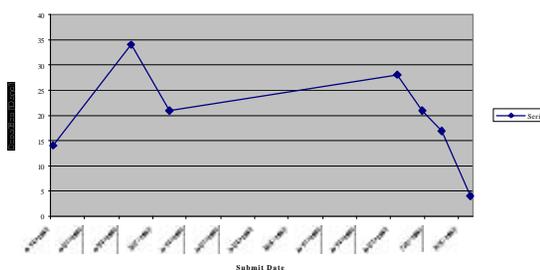


3) Timeliness of CR resolution is consistent or improved for Pilot teams:

ECM has streamlined the existing CR process. The process has been clearly documented, teams trained, and teams can view status of a CR anytime online. Major status updates immediately generate notifications to affected parties.

Overall CR resolution times have improved...

Closed CR Duration Metric





Operating Partner Pilot Success Criteria Detail

4) Visibility to the data is sufficient to manage CR activity for the Pilot Teams:

FAFSA and CPS have weekly sessions and incorporated ECM reports into the meetings.

Of the 120 Change Requests nearly 20% of the total were shown to affect FAFSA, CPS or Pin Site in some way. VDC Service Delivery Managers (SDMs) have access to the data needed to keep teams informed.

“ECM is a useful tool and provides me with the information I need” - Mike Healy VDC SDM

Production Change Request Metrics Report					
ID	SYS	Submitted	Closed		Duration
			Successfully	Req Imp	
VDCMP00000192	EAI	2-Apr	6-May	21-Apr	34
VDCMP00000216	ITA	16-Apr	6-May	21-Apr	20
VDCMP00000214	ITA	12-Apr	13-May	21-Apr	31
VDCMP00000199	EAI	4-Apr	3-Jun	21-Apr	59
VDCMP00000219	EAI	25-Apr	3-Jun	28-Apr	38
VDCMP00000250	FAFSA	17-May	12-Jun	30-May	25
VDCMP00000296	FAFSA	17-Jun	15-Jul	30-Jun	28
VDCMP00000252	ITA	20-May		2-Jun	64
VDCMP00000314	CPS	25-Jun	24-Jul	2-Aug	29
VDCMP00000339	Pin Site	15-Jul			9
Total			10	8	NA

5) Pilot Participants understand and buy-in to the purpose & objective of the CR Process and supporting Tool:

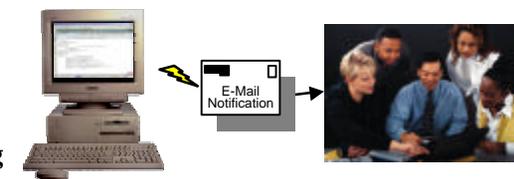
All participants were trained on the purpose and use of the ECM Tool & Process:

“The Tool pushes the information to us – we need this Tool” - Ida Mondragon, FSA Project Manager

“The tool is easy to use and I like that the tool notifies me of CR updates and of pending CR’s which may affect my application areas” - Nina Colon, FSA Project Manager

“Working fine for me” – Pat Dominy, FAFSA ECM Tool User

All Stakeholders Receive Email Notifications



6) Pilot Participants’ feedback is incorporated into ongoing Pilot improvement efforts:

Pilot Team members coordinated & exchanged information in the following ways:

ECM Tool Weekly Status Meetings

FAFSA PIN Site, CPS Weekly Status Meetings

ECM Tool Change Control Group Session

ECM Pilot Mid-Point Review session

In all of these sessions Pilot team members’ input and feedback was sought out and incorporated. Pilot teams input significantly improved our training material and roll-out process. The pilot teams also provided input into tool updates and report improvements, which have been logged and will be incorporated in future releases of the tool.

Regular ECM Meetings





Next Steps - Operating Partner Roll-out

Operating Partner (Pilot) Teams now using full ECM Capability	
Application Team	ECM Roll-out Complete
1. FAFSA (NCSP)	June
2. PIN Site (NCSP)	June
3. CPS (NCSP)	June

Develop detailed roll-out plan & schedule for the following Operating Partner Application Teams once executive approval is achieved

Other Operating Partners to be Scheduled for ECM Roll-out	
Application Team	ECM Roll-out Complete
1. IFAP (INDUS Corp.)	August
2. Schools Portal (INDUS Corp.)	August
3. ECB (INDUS Corp.)	August
4. NSLDS (Raytheon)	September
5. DLOS	TBD
6. DLSS	TBD
7. FFEL	TBD
8. Ombudsman	TBD
9. PEPS	TBD



Pilot Participant Feedback and Recommendations

Pilot User Feedback Round Robin questions: (Application Team & Data Center Groups)	Response:
1. Did the Pilot meet your needs and expectations as a user?	1. Criteria met 2. Criteria partially met (additional action required) 3. Criteria not met
2. In your opinion did the Pilot meet the success criteria	1. Criteria met 2. Criteria partially met (additional action required) 3. Criteria not met
3. What do you like best about the ECM Tool and Process?	Open
4. What would you like changed?	Open

Pilot Executive Committee Decision: (All in attendance)	Response:
5. Do you recommend approval by the Executive Committee to proceed?	1. Yes 2. Yes (with action) 3. No

Operating Partner Pilot Conclusion Sign-off



FSA CIO ITS:

(Mike Fillinich, Keith Wilson or Representative)

FSA CIO eCAD:

(Charlie Coleman or Representative)

Channel:

(Jeanne Saunders or Representative)

Operating Partner:

(Mike Cline, Bill Schulte or Representative)

VDC:

(Dave Lass or Representative)