FSANow

The Monthly Newsletter for FSA Staff

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New FSA Five-Year Plan

Within the next few weeks, FSA will complete its new Five-Year Plan. The Five-Year Plan, spanning FY 2003-2007, is a congressionally mandated "road map" to guide FSA in achieving its strategic objectives. But while this tactical document provides long-term strategic guidance, it also influences our day-to-day activities.

"The process to develop our Five-Year Plan is critical to FSA's future direction," said John Fare, Senior Advisor to the COO and the Five-Year Plan team leader. "Having a clear definition of where FSA wants to be in five years is vital to our ultimate success as an organization."

John Fare, Colleen McGinnis and Jane Holman meet to discuss the Five-Year Plan.

FSA's Strategic Drivers

- PBO legislation
- President's Management Agenda
- GAO High-Risk List
- ED's Strategic Plan
- One-ED Initiative

The PBO legislation, part of The Higher Education Amendments of 1998, identified four goals to guide FSA in administering Title IV student aid programs: (1) Improve Service (2) Reduce Costs (3) Improve and Integrate Support Systems (4) Develop an Open, Common, and Integrated Delivery and Information System. Management later redefined the goals to focus on FSA's numerous internal and external stakeholders: (A) Program Integrity (B) Customer Satisfaction (C) Unit Costs (D) Employee Satisfaction. In 2002, management repositioned FSA's goals into five strategic objectives based on the strategic drivers that influence the environment in which FSA operates.

While the Five-Year Plan provides high level, long-term direction, there is also a need to provide shorter-term focus. To address this, management created the FSA Performance Plan, a list of strategies to further focus management priorities over a single year. Within the Performance Plan, each strategy is divided into component categories providing management with a detailed blueprint of steps necessary to achieve the stated objectives.

FSA's Strategic Objectives

1) Integrate FSA systems and provide new technology solutions
2) Improve program integrity
3) Reduce program administration costs
4) Improve human capital management
5) Improve products and services to provide better customer service

At the operational level, the Investment Planning Committee, where FSA departmental priorities and day-to-day activities are chosen and ultimately funded, was established to identify priorities for the Performance Plan.

While the new Five-Year Plan spans fiscal years 2003-2007, the PBO legislation requires FSA to update it annually. In the course of its yearly revision,

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FSA in San Francisco


Terri Shaw meets with Region IX staff members.

Terri Shaw visited Region IX on April 30, and joined the San Francisco staff in an all hands meeting. Terri was joined by other members of her management team including, Jeff Baker, Kristi Hansen, Kay Jacks and Marianna O'Brien.

Terri began her presentation with an overview of the FSA planning process and a discussion of the FSA Performance Plan. She shared her vision for FSA and her commitment to frequent and meaningful communication with the regions. She showcased the Dashboard Report and indicated that the report was a new tool to assist staff in monitoring operational performance.

After her presentation, Terri opened the floor and entertained two hours of questions and answers from the staff. Questions ranged from space issues to One-ED to succession and retention planning. Terri plans to visit the Dallas regional office this summer which will complete her first tour of the regions.

Q & A with Region IX Area Case Director Jim Castress

What FSA functions are located in the San Francisco office?
There are four teams including:
1) The San Francisco Case Team, which is responsible for ensuring that participating schools are properly administering the student financial aid programs, so that students are receiving money for their education in an accurate and timely manner.
2) The San Francisco Service Center, which is charged with resolving student loan debts that were not paid to the prior holders of the loans and have been assigned to the Department of Education.
3) The School Relations Office, which is responsible for working with schools and the Department to improve Title IV program integrity and accountability.
4) Financial Partners, which, in partnership with guaranty agencies and financial institutions, ensures the proper administration and management of FFEL programs by providing technical assistance, customer service and program evaluations in a consistent and timely manner.

Tell us about the joint efforts where the different teams partnered.
The FSA Region IX staff has partnered on a number of efforts. We have established a student outreach group that includes members from all functional areas. This team has attended numerous college nights at local high schools to answer student and parent questions regarding financial aid. Last fall, we staffed the FSA

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San Francisco Attractions

* The famous historic cable cars, which have been chauffeuring passengers over the hills of the city since 1873.
* Alcatraz, a tiny island offshore in the Bay, which used to house America's most notorious prison.
* Coit Tower, a landmark structure providing breathtaking views from the top of Telegraph Hill.
* Eight turns in one block in the 40-degree downward slope of Lombard Street, the "Crookedest Street in the World."
* The Golden Gate Bridge, where bay meets ocean and the most-photographed man-made structure in the world.
* The historic Spanish Mission Dolores, dating to 1776.
* The Transamerica Pyramid, San Francisco's tallest skyscraper, is a unique architectural landmark.
* Chinatown – the largest center of Chinese commerce outside of Asia.
* Fisherman's Wharf, which has some of the best seafood restaurants in the world. They serve up several Bay area specialties including fresh Dungeness Crab and a local favorite, Pacific Sand Dabs.

Did You Know...

How ED Policies Are Developed?

The Administrative Communications System (ACS) informs ED employees of the Department's policies, procedures, requirements and other important information through the use of directives and handbooks. From continuity of operations plans to carpet procurement and installation, ACS Directives govern a wide range of internal ED issues. The ACS does not deal with program regulations; rulemaking documents; budget-related communications without policies and procedures; information that only affects one principal office; negotiated labor agreements; and instructions to be used government-wide. For more information, go to http://connected1.ed.gov/po/om/executive/print/acs_om_1_101.doc.

Additional information is located at http://connected1.ed.gov/po/om/executive/acs/main.html, including an alphabetical chart (http://connected1.ed.gov/po/om/executive/acs/alpha.html) listing of all of ED's current directives and handbooks.

EXTRA! EXTRA!

Employee Recognition

Congratulations to Jamie Malone, FSA University's Region V training officer, who received an award from the Wisconsin Association of Student Financial Aid Administrators during its spring conference on May 15. Jamie received the Special Recognition Award for her tireless and dedicated service to the student financial aid profession.

Summer Conferences

FSA representatives will attend the following summer conferences: Career College Association Annual Convention (CCA), June 25-27, Las Vegas; National Educational Computing Conference (NECC), June 30-July 2, Seattle; National Association of Student Financial Aid Administrators (NASFAA), July 9-12, Salt Lake City; National Association of College and University Business Officers (NACUBO), July 26-29, Nashville; 2003 Software Developers Conference, Aug. 14-15, Arlington, VA.

Castress Q & A, con't

booth at a college fair sponsored by the mayor of Los Angeles for 10,000 high school students. For the past two years, the Region IX School Relations Office and Case Management Office are working informally on a cooperative effort visiting schools new to the Title IV programs. This partnership has resulted in more than 50 school visits. The teams have also worked together to ensure the success of our regional partnership meetings with our state guarantors and licensing agencies. Each team participates in our quarterly meetings to ensure adequate resources are available to resolve school/student issues and perform joint reviews as applicable with the guarantee agencies of schools/lenders.

What is unique about the San Francisco office?
Our creativity and willingness to get the job done, whatever it takes. This can be seen in our partnership efforts which seek to resolve overlapping issues.

Has San Francisco particularly benefited by having FSA in the city? How?
FSA has worked with elementary schools, both in San Francisco and Oakland to distribute excess computer equipment to low-income schools with disadvantaged students. Staff members participated in a teacher assistant program at local schools, developing lesson plans and teaching the students. We have also worked with representatives in San Francisco, Oakland and other nearby counties to make staff available for student outreach and student financial assistance. We are available as a resource to local financial aid administrators and lenders and offer them easy access to staff for technical assistance and other related issues.

What else would you like FSA to know about the San Francisco team?
FSA staff are committed to doing the best job possible to ensure that No Child is Left Behind and that the Department's goals are attained.

FSA*Now*

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FSA Now is a monthly newsletter for FSA staff available on FSAnet. To share feedback or contribute ideas, e-mail FSA Communcations.

Welcome FSA Summer Interns

On June 2, 31 undergraduate and graduate students began a two-month summer internship at FSA. Thirty of the interns are at headquarters and one intern is working in the Atlanta office. These interns have traveled from universities across the country and overseas to learn about FSA. The following is a list of the best and the brightest.

Name	Channel	School	Major(s)	Year
Dexter Ang	CIO	MIT	Mechanical Engineering	Rising Junior
Javier Arevalo	ATO	Georgia Institute of Technology	Industrial and Systems Engineering	Rising Senior
Adonna Bannister	Ombudsman	Howard University School of Law	Sports and Entertainment Law	2nd Year Law Student
Kate Caballero	COO	Florida State University	Public Administration/Public Policy	Graduate Student
Andy Chicas	CIO	College of William and Mary	Business Administration	Rising Senior
Julia Chiu	CIO	Harvard University Graduate School of Education	Education	Graduate Student
Kristian Crusto	CFO	Loyola University New Orleans	Finance/Economics	Rising Junior
Jennifer Do	Schools	University of Virginia	Systems and Information Engineering	Graduated
Varonica Frye	CFO	Boston University	Business Administration	Rising Junior
Rose Grabowski	Contracts & Acquisitions	MIT	Management	Rising Junior
Tamika Hopkins	CFO	St. John's University	Economics	Rising Sophomore
Roberto Impeduglia	Communications	Boston College	Economics AND Theology	Rising Junior
Kelly Kistner	CIO	University at Buffalo, State University of NY	Sociology AND Business Administration	Graduated
Johnathan Lauer	CIO	Ohio University	History	Graduated
Sabrina Lemieux	Schools	Wake Forest University	Information Systems	Graduated
Jessie Li	PMO	Polytechnic University	Computer Science	Graduate Student
Emily Marthaler	FSAU	George Washington University	Political Science AND Economics	Rising Junior
Ariana Martini	Financial Partners	St. Andrew's University	Economics AND Italian	Rising Junior
Joy Mossman	CIO	College of William and Mary	Marketing AND Sociology	Rising Junior
David Muraskin	Schools	University of Chicago	Fundamentals: Issues and Texts	Rising Junior
Priya Notani	CIO	University of Southern California	Operations Research	Graduate Student
Jameka Pankey	FSAU	North Carolina A&T State University	Political Science	Rising Senior
Kate Reber	Students	Columbia University	Comparative Literature	Rising Sophomore
Michelle Ronis	Financial Partners	City University	Political Science	Rising Senior
Danielle Rosemond	Contracts & Acquisitions	University of Pittsburgh at Johnstown	Business	Rising Junior
Mike Salwin	CIO	Carnegie Mellon University	Information Systems	Rising Junior
Mehal Shah	Analysis	University of Pennsylvania	Computer Science and Engineering AND Philosophy	Rising Junior
Erica Shein	Ombudsman	Princeton University	Politics	Rising Senior
Drew Sindlinger	Analysis	George Washington University	International Affairs	Rising Junior
Heidi Sondermann	Students	University of Virginia	English	Rising Senior

*My*FSA

FSA *Now* talked to Jay Hurt about his role in Financial Management Systems Requirements and Testing.

Q: Describe your role at FSA.
A: I am the Director of Financial Management Systems Requirements and Testing (FMS) within the Office of the Chief Financial Officer. In this position, I am responsible for assisting the CFO in maintaining a clean audit opinion on FSA's financial statements and overseeing FMS Operations. Additonally, my position is responsible for action items for all FSA-related audits and refining FSA cost accounting methodology and processes.

Q: What has been, or will be, your biggest challenge as director of Financial Management Systems Requirements and Testing?
A: My first reaction is that my division has too much to do and not enough resources to get it all done. However, considering that this is the same song-and-dance that most other directors would have, I better try to be original. From a personal perspective, I suppose one of the biggest challenges is adjusting from an outside consultant's point-of-view to an internal director's point-of-view.

As a consultant, I was responsible for recommending and implementing solutions to specific problems. I had clear start and end points to my tasks. While I was quick to identify potential issues, I did not have authority/responsibility to act on issues identified until directed to do so by my client. As a director, I am responsible for all issues within my environment from the moment that they are identified. Consequently, I must continuously review and adjust my resource usage/assignments to the ever-changing set of issues that I face. This need for continuous monitoring has resulted in some interesting work/life balancing questions for me. Of all challenges, this is turning out to be the biggest personal challenge.

Q: Tell us about your previous professional experience. How will those experiences assist you in performing your duties at FSA?
A: My recent professional experience includes four years at the Department of Treasury; two years at American Management Systems; and five years at Coopers&Lybrand / PricewaterhouseCoopers / PwC Consulting / Monday / IBM.

Over the last 11 years of my professional life, I have been busy claiming that (1) I am not an accountant and (2) I am not a systems guy. Meanwhile, my experience has been slowly and meticulously building to this point, where I am now responsible for a financial management system (i.e., in the role of a lead systems accountant).

I have found that my experiences have taught me the value of always knowing the details of the tasks and issues for which you manage. While it is important to delegate responsibility, it is also important to stay informed in the details of that which you manage. By spending the extra time knowing the details, I feel that I am able to make informed decisions quickly.

Q: If you could describe yourself in three words, which words would you choose? Why?
A: Honest. In the long run, it is always less painful to tell the truth up-front. Besides, I wouldn't be able to remember the lies, if I told them.

Persistent. If I feel that I am right about something, I will need to be convinced otherwise before I will let it go.

Easy-going. Business is business. There are very few things in life that are true "EMERGENCIES." If you're not experiencing one of them, why take it personally?

Q: When you're not working at FSA, what do you enjoy doing?
A: Playing with my kids, Jacob and Christopher. I figure that I have, at most, a 10-year window before they don't want to hang-out with Dad anymore. I better make use of the time, while I've got it.

Five-Year Plan, con't

the COO is required to consult with students, institutions, Congress, lenders, and the Advisory Committee prior to implementing changes to the plan. The Five-Year Plan will be available on FSAnet later this summer.