



OCTOBER 2006 STAKEHOLDER MEETING MINUTES
October 25, 2006

Next Meeting

Date: Wednesday, January 10, 2007

Time: 1:30 p.m. to 3:30 p.m.

Place: HHS – Hubert H. Humphrey Building

All meeting materials and presentations are available at Grants.gov by visiting <http://www.grants.gov/Stakeholder>.

Opening Remarks and Presentation:

Ms. Terry Nicolosi, Acting Grants.gov Deputy Program Manager, began the meeting at 1:30 p.m. with the following agenda:

- Grants.gov Update and Highlights of 2006
- Meet the New Grants.gov System Integrator Team
- Grants.gov Program Management Office: Look at 2007 Business Process Improvements
- Questions & Answers/Wrap Up

Ms. Nicolosi started the meeting by thanking everyone for coming and reviewing the agenda.

Grants.gov Update and Highlights of 2006

Ms. Nicolosi provided the Grants.gov update, explaining the recent system integrator transition and going over the 2006 highlights.

Some usage highlights included the below:

- Over 450% growth in submissions received
- 2006 Digital Government Achievement Award
- Site redesign and usability lab input from grant community
- American Council for Technology Intergovernmental Solutions Award Finalist
- Major hardware upgrade deployment handles record breaking submissions
- Deployment of the integrated Find and Apply

Ms. Nicolosi told the group that going from 25% to 75% wouldn't have been possible without the support from the Agencies, P.L. 106-107 work groups and various other groups. There was also a big increase in the number of submissions received. The

Herculean effort from the grant-making Agencies allowed Grants.gov to get where we need to be with AORs. The status seen at the end of this fiscal year really shows off all of that hard work. Grants.gov also received the Digital Government Achievement Award in 2006. One thing that the team realizes that we came a long way with the site redesign, but there are still a lot of things that can be done to improve the site as a whole.

Grants.gov will try to take what was in the GAO audit and the P.L. 106-107 feedback in order to always keep improving the process. Ms. Nicolosi explained that she would be presenting these results to the Grants Executive Board meeting the following week along with information about the recent System Integrator transition to Anteon. Grants.gov is working to ensure that users are fully aware of the changes going on and want to make sure that the new system is not something that is just put out, but is presented little by little with status updates all along the process. Grants.gov is thankful to all of the Agencies for their patience with the transition and also appreciates all of the work that Northrop Grumman put into the project. They started out the Grants.gov system on a blank slate and did a tremendous amount of work. They were instrumental over the years and although the system isn't seamless, it works very well.

Ms. Nicolosi also discussed trying to improve the Program Management Office travel and outreach in order to reach the right people in the grant community. After looking at some statistical information on meetings and outreach efforts, Grants.gov wants to make sure that their time is best spent.

Ms. Nicolosi then reviewed the upcoming IBM Workplace Forms Viewer (Mac) Release. She explained that it is not a Grants.gov product and went over some of the features, including:

- Offline editing on Mac (Edit/Save/Reload/Edit)
- Only XFDL features used:
 - Limited features such as English-only, version 5.x only, static layout, etc.
- Precise Layout according to XFDL standard 120 DPI
- Arial Font Rendition Compatibility between Mac & Windows
- Attachments: Enclose, Extract, Remove & Display
- Standalone/Native Viewer with secure submission capability
- Ability to save form as document for user email attachment
- System: G4/G5 PowerPC (not Intel) Single user, Mac OS 10.4 latest patches

Ms. Nicolosi explained that the testing of the IBM product would be done by the Grants.gov IV&V team and members of the grant community, coming from NIH, NSF, FDP and COGR. Grants.gov will be posting updates on this to the website and will keep users informed on status. The release is scheduled for November. We want to make it easy to use and provide as many tips as possible during this process.

The next item Ms. Nicolosi covered was explaining to attendees the Joint Application Design (JAD) team that has been put in place for the System Integrator transition. Some highlights of this discussion included:

- The next phase of the system integration work will be the development and deployment of the system by Anteon that is scheduled to be completed by April 1, 2007. Deadline for nominees 10/25/2006
- During any rapid application development and deployment, a built in joint application design (JAD) team consisting of representatives of the end user community is standard operating procedure.
- This formation of the grant community to include both grantee and grantor technical representatives is to build in end user acceptance of the phased development so that by the end of April 30, 2007, the Grants.gov system changes will be incorporated into the fabric of the grant community.
- This involvement of end user representatives also addresses the recent GAO Audit on Grants Streamlining that encouraged the Government to incorporate end user feedback into technical deployment of government wide systems.
- Grants.gov PMO has been in touch with the Federal Demonstration Partnership and Council on Government Relations to address submitting representatives for the JAD from the research community as well as the National Grants Partnership for nominations from the grantee community of state and local governments and nonprofit and from the GEB for other applicant community representatives.
- We solicit the Grants Executive Board in volunteering three technical representatives that would fit in the Large, Medium and Small Agencies and any nomination of a representative of the grantee community that falls in the following category:

The proposed JAD will consist of 10 representatives:

1. State
2. Nonprofit
3. Research
4. Housing
5. Tribal organizations

Ms. Nicolosi then introduced the new Anteon System Integrator team's Program Manager, Ms. Eleanor Robinson.

Meet the New Grants.gov System Integrator Team

Ms. Robinson thanked Ms. Nicolosi for her introduction and explained that Anteon was very happy to have the opportunity to meet everyone during the Stakeholder Meeting. She and her team would be covering the status of the transition and also explain the background of the Anteon team members. Ms. Robinson explained that several members of the Anteon team were there and they would take turns covering what they have been doing over the last few months to transition, going over the system, forms conversion, and many other things.

Anteon Grants.gov Team

- Ms. Robinson, the System Integrator Project Manager, gave a brief outline of her experience, explaining that she has had a lot of experience with grants, working for 10 years with Disaster and Non-Disaster grants experience with FEMA's National Emergency Management Information System (NEMIS) project, using

the SF-424 Form and following the end-to-end grants lifecycle. She also has 20 years of software development experience and over 10 years of project management experience. She then introduced the rest of the Anteon team in attendance.

- Mr. Harsha Rao will be the Principal System Architect on the project. He has worked with ERA, NIH and HUD and may be familiar to many attendees. He'll be speaking later about our 2007 solution. He is a specialist in Service Oriented Architecture and has extensive experience with XML schema development. Mr. Rao was also a participant in ERA internal and external applications and has a great deal of experience in system-to-system interfacing.
- Mr. Sandy Rosenberg from IAI is also one of the participants to the Anteon 2007 solution. He will be the Forms Development Lead and IAI will be providing the Forms Factory team. He is an expert in use of Section 508 compliance tools and has 8 years of Adobe eForms experience including Adobe LiveCycle. Mr. Rosenberg is also experienced in utilizing IFDPS for eForms development and FMTS for eForms.
- Mr. Scott Bethke will be the Systems Operations Lead. He has 25 years experience in hosting, network management and data center migrations. Mr. Bethke is an innovative network design engineer with top-level escalation and troubleshooting experience and has expertise in Cisco, Juniper, Foundry, and Extreme Networking.
- Mr. Dan Dumitri will be the System to System Lead. He actually wrote the original system-to-system interface for Grants.gov.

Phased Transition

Ms. Robinson then explained that there were three phases for the transition in the Anteon proposal. So far, everything has been on track as far as relocating the development system and other transition efforts have gone smoothly. They have done a power-off test, which took a lot of careful work, but was important to do when switching over the system. Anteon also relocated production and over the course of two days, moved the production servers. Mr. Chris Schroeder is now answering all of the production questions or issues. By using a careful, staged relocation strategy, Anteon has been working to reduce the transition risk to a minimal level. They have been using tried-and-true knowledge transfer techniques to enable the continuity of operations.

Methods of transition include holding discovery team meetings for operations and code, shadowing Northrop Grumman and reviewing system documentation.

The transition demonstration include the below:

- Create Weekly Operations
- System Status
- System Activity Reports
- Deploy a Content Build
- Execute a Forms Development Change and Deploy
- Execute a J2EE Code change and Deploy

Ms. Robinson then explained that Anteon wouldn't have been able to be as successful with the transition with out the help of the Grants.gov IV&V team.

Role of IV&V with Transition

- eForms conversion
- 2007 system solution
- Summary

Mr. Eric Opp is the IV&V Transition Lead and has had an active role with the System Integrator transition. He has monitored all equipment moves and reviewed transition plans and schedules. Mr. Opp has also validated and monitored timing of all equipment moves, worked with Anteon & Northrop Grumman to validate deliveries and attended Operations & Software Discovery Meeting. Mr. Kevin Harp is the IV&V Ongoing Project Manager. He has validated transition demonstration results and has provided Anteon with value guidance on Grants.gov standard procedures for development, deployment, and acceptance testing.

Ms. Robinson then had Mr. Rosenberg take the audience through the eForms conversion. Anteon will be replacing PureEdge Forms with Adobe. The goal is to enhance the user experience with the below enhancements:

- Platform independent
- MAC, Linux, Unix and Windows compatible
- Eliminate Citrix interface
- Industry standard Internet forms tool
- Familiar PDF look and feel
- IAI has substantial expertise in conversion of PureEdge forms to Adobe; providing automated scripted solutions

Mr. Rosenberg said that the idea is to make it as easy to use as possible. The new System Integrator team sees a lot of things that will really improve Grants.gov for the future.

The primary features of system and approach include:

- Adds support for PDF forms for improved cross-platform support & usability
- Maintains support for existing Workplace/PureEdge forms for backward compatibility
- Improves search performance and quality with Google appliance
- Keeps existing Web interfaces to minimize end-user and S2S impacts
- Keeps existing servers and most server software to minimize cost
- Eliminates dependence on proprietary software framework for better maintainability

The 4/01/2007 system impacts include:

- Applicant will need to install free Adobe PDF reader; PureEdge will no longer be needed unless applicant is working with old packages
- No need for Acrobat Professional. Grants.gov PDF packages will be constructed to allow users to save their information

- Look and feel of the existing forms will be preserved
- Applicants will still be able to click on a button and see a list of data fields that need to be completed
- The package will automatically do a validation check on all the fields when user clicks on submit
- Existing logins will continue to work; no change in any of the other user processes including ability to track status of submitted application
- All new packages created after 4/1 will be Adobe based
- Existing functionality remains the same, create opportunities
- Little to no impact on S2S users and AORs

The eForms conversion methodology will include:

- Implementation plan
 - Standards
 - Schedules
 - Rapid prototype
 - Forms conversion
- Rapid prototype
 - Develop 2 forms
 - Create Grants.gov objects library
- Forms conversion
 - IAI's phased approach

The eForms Factory will cover the below:

- Convert look, feel and action of Pure Edge forms to Adobe eForms (PDF)
 - Look – lines, boxes, text, data entry fields
 - Feel – set tabbing, navigation, data validations
 - Act – apply scripting, business rules and accessibility.
- QA all levels of form

The status of eForms is outlined below:

- Had our kickoff meeting and created our work plan
- Prototyped - SF424 and CD511
- Delivered prototype for internal acceptance testing
- Beginning batch one conversion, implementing lessons learned from prototype
- Core SF 424 Form Families (4040 series) then Agency specific based on utilization

Mr. Rosenberg then answered questions about the forms conversion.

Q: Regarding form functionality, can we assume forms will stay the same? And does that apply to the schemas as well?

A: The forms will definitely stay the same and we are trying to make it so the schema doesn't change either. We just spent two days with Adobe and we may need to move prototyping on our end, but we will do our best so there is little to no change.

Ms. Robinson then had Mr. Rao go over the new 2007 system solution. He explained that it will cover:

- Successes of the existing system
 - Conserve healthy components
 - Leverage existing infrastructure
- Opportunities for improvement
 - Better throughput at peak times
 - Remove processing bottlenecks
 - Usability and true platform independence
 - Improve search capability

The 2007 System Deliveries include the below:

- Agency System to System
 - Data model changes
 - Inflow suite dependency removed
- Forms integration
- New Forms Repository
 - Stitching solution
 - XML extraction
- Grantee System to System
- Google search appliance
- Apply processing
 - Service infrastructure
 - Intake and virus checking service
 - Notification, packaging & other services

Mr. Rao explained that one key thing that has been part of the Anteon approach is to minimize any risk. By being very sensitive to form and schema changes, they hope to make it a smooth transition and have been working hard with Adobe to keep striving towards that goal.

Anteon then went through a graphic overview of the 2007 system which is shown in the stakeholder presentation. They then covered the Google Search that will be implemented, explaining its benefits:

- Eliminate the load on the database for full-text searching
- Google appliances will enhance user experience with drastically reduced search time
- Familiar interface
- Spellchecking/suggestion of misspelled word
- Capable of caching 50,000 grant opportunities

Anteon then gave a summary of the technical solution:

- Reduced processing burden w/ increased throughput
- Platform Independence-elimination of Citrix
- Enhanced search capabilities

- Enhanced current user experience
- Re-use of many system components
- Architected for greater functionality and throughput

The Anteon team then answered several more questions from the audience.

Q: Is there a time scale for the phase out of PureEdge?

A: We can still support the capacity currently and will be communicating schedules as we move along in this transition process.

Q: As far as speed of processing, will we be able to see any changes there?

A: The new system will be in production on April 1, 2007 and we will see what the status is then. We can't really estimate how it will affect the speed.

Q: So we can still use PureEdge until April 1, 2007?

A: Yes, we are not developing new forms requirements until April 1, 2007 and those will be in Adobe.

Q: Is there a chance to preview the new forms?

A: Yes, the JAD team will be providing structured feedback.

Q: When can the user community expect the Mac Viewer to be available?

A: We are not sure since it is not our product. But we will definitely be testing and will provide feedback on it.

Q: I noticed that you are going to get applicant user feedback on the new system. Do you plan to get grantor user feedback as well?

A: Yes, we have the User Group led by Vince Sprouls.

Q: If we're talking April for production, is the next step testing?

A: We just finished transferring the hardware and software. We are now in the process of converting forms. We will then work with the Agencies to come up with a schedule.

Q: Will there be a vendor representative on the JAD team?

A: No, the JAD representatives include the applicant and Federal community.

Q: Will we see increased functionality when using the Adobe forms?

A: I think there is an opportunity for increased functionality here.

Q: Any recommendations as far as which version of Acrobat Reader we should use?

A: The forms will work with version 7 or 8, so if people have problems, just upload the free version 7.

Ms. Nicolosi then stated that Grants.gov is excited about this transition and that Anteon has been a great team so far and the Program Management Office would like to applaud their efforts thus far.

Grants.gov Program Management Office: Look at 2007 Business Process Improvements

Ms. Nicolosi started off this part of the meeting telling attendees that when Grants.gov first began, one main goal was to make sure that people didn't have to train to use the system. Grants.gov has been moving forward, moving from PureEdge to Adobe will be the next big thing and the team hopes that you feel more comfortable with all of the upcoming changes after seeing the previous presentations. We are working with OMB, GPC and GEB to make sure the process is as easy as possible.

The Grants.gov FY07 mission covers many elements and is outlined below:

- Establish and strengthen Grant community communications with Grants.gov
- Grants.gov system conversion, development, & deployment
- Data standardization, conversion, development & clearance of forms with OMB/GPC/GEB
- Maintain systems operations & maintenance
- Enhance Grants.gov program operations through standard operating procedures, communication management, earned value management and return on investment and the communications with Grant community

Ms. Nicolosi went over the Grants.gov organization chart, which is in the stakeholder presentation. She explained all of the working parts of the organization, from the top level down, introducing all of the members of the PMO and Grants.gov contractors.

The PMO team that she pointed out included:

- Keenon James, Grants.gov Lead Program Advisor, Forms Team Lead
- Vincent Sprouls, Grants.gov Policy Coordinator and System to System Lead
- Michael Pellegrino, Grants.gov Business Transformation Lead: Contact Center, Web content
- Christopher Zeleznik, Grants.gov [insert title]

Questions & Answers/Wrap Up

Ms. Nicolosi then asked if the attendees would like to have a meeting on December 27 since it was during the holiday season. The group decided that they would rather postpone the next Stakeholder Meeting until January 10, 2007.

Ms. Nicolosi asked if any of the attendees had any further questions. The group did not and she then thanked everyone for joining Grants.gov for the meeting.

The meeting concluded at 3:00 p.m.