

Phoenix Worldwide Deployment  
Information Sheet  
As of July 29, 2003

**History**

- Washington Deployment:
    1. Procured JFMIP Compliant Momentum on September 29, 1999.
    2. Implemented Phoenix for Washington operations on December 15, 2000.
    3. Stabilize system and correct migration through FY 2002.
  
  - WW Deployment Funding:
    1. USAID Capital Investment Fund first appropriated in FY 2003.
    2. OMB Apportioned Funding (including Phoenix funding) on June 6, 2003.
    3. Congressional Notification freeing funds expired on June 26, 2003.
    4. \$4.4 Million is available for FY 2003 work on WW deployment.
  
  - Joint State/USAID Activities:
    1. Jan/Feb work with State on collaboration study through Grant Thornton.
    2. Final Grant Thornton report dated March 25, 2003 recommends October 1, 2005 goal for State and USAID to use a single version of Momentum, two databases.
    3. Executive Steering committee and working groups meet in May and June, 2003.
    4. Booz Allen to commence work with State/USAID on July 3, 2003 to prepare joint OMB 300 Business Case for FY 2005 funding.
  
  - Commencement of Phoenix Deployment Activities:
    1. CFO, Rabern negotiates reorganization and roles definition for CFO sponsorship of Phoenix deployment efforts from March thru June 2003.
    2. As of June 1, 2003, teams are developed to address WW deployment of Phoenix with team charters developed by June 30. (Teams: Program Management, Functional Configuration, Technical Configuration, Data Migration, and Change Management.)
    3. As of June 26, funds are available for programming into contracts for work on deployment, after expiration of Congressional Notifications.
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**Upcoming Plans/Activities**

- Planning:
  1. July 2003: Complete Charters, Work Breakdown Structures and determine contract mix for planning.
  2. July 25, 2003: Identify pilot missions.
  3. August thru December 2003: Planning for deployment will address various technical and functional issues that must be completed before roll-out can commence.

- Piloting:
    1. Approximately September 2003: Field test current versions of Momentum for technical assurances that telecommunications structure can support WW deployment.
    2. February/April 2004: First pilot implementation will likely occur in LAC (Peru is top candidate because of mission commitment, diversity of telecommunications capabilities and relativity to Washington time for support. Two other sites are being considered).
    3. April thru June 2004: Two additional pilots to come on line. (Hiatus possible for further implementation during remainder of Summer 2004 to address issues of first pilots and to prepare of FY-end financial statements).
  
  - Implementation:
    1. FY 2005 expected to complete replacement of MACS in a total of 38 accounting stations by July 2005.
    2. July thru September 2005: Work to complete consolidation of USAID Phoenix system onto State servers in Charleston, SC.
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### **Issues/Risks**

- Must determine if ALL accounting stations, and ultimately ALL USAID missions, can accommodate Phoenix. Telecommunications restrictions could require alternative definition.
  - Must determine IF an acquisitions package can and will be integrated with Phoenix and WHEN. Timing may impact schedules.
  - Still arranging staffing to fully support WW deployment. A project manager has been assigned, but other key positions (like Certified Project Manager) must be filled. Departure of CFO and Deputy CFO creates pressure on existing personnel and adds project risk.
  - Determination of target version of Momentum for October 2005 State consolidation.
  - Change Management at missions may be more problematic than actual installation and training for software operation. Communications and change management must be managed effectively.
  - Funding must remain available in a constant stream. \$4.4 is available for FY 2003 but the remainder of the \$25M budget must be steady to achieve schedules.
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### **Operation of Phoenix at Overseas Locations – How will it work?**

- Missions will communicate financial information to a central Phoenix database, on a real-time basis.
- Within 25 months, all MACS processing will be replaced by Phoenix processing (although MACS may remain operational for historical research by missions).

- Phoenix deployment over the next 25 months does not include integration with a procurement solution, instead, such an integration will be delayed until late 2005 or into 2006.
  - In the beginning, only mission Controller personnel will access Phoenix. Later in implementation, users will be expanded so that transactions can be recorded “when and where they occur”.
  - In the event that telecommunications will not support Phoenix “live” operations, M/IRM has committed (and funds have been set-aside) to develop an alternative processing capability to transmit information to the Phoenix database.
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### **State/USAID Collaboration on Financial Systems**

- State and USAID Financial staff are currently working on FY 2005 planning documents (OMB 300s) that will enable hosting of a single version of software Momentum at the Charleston, SC State facility, on which will reside Phoenix as a separate USAID financial database. Development of this capability will require funding from both State and USAID to assure success.
- It is planned that the hosting of Phoenix, by State, will occur in October 2005.
- Because State and USAID business processes and information requirements are very different, the separate databases will permit USAID to continue to manage business processes differently from State.
- Conversion to hosting in Charleston will require both State and USAID to consistently update software to higher versions of Momentum. This upgrade for USAID is expected in late 2005 and will then permit integration of a procurement solution.
- This joint hosting will not change impact on our domestic or overseas operations, although it is intended to save money on testing, training, support, etc... for both agencies. Development of any add-on capabilities can result in reduced costs for both agencies when planned collaboratively.

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