



[Link to Discovery Phase IAA \(FM\) Terms & Conditions](#)



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Federal Agency Migration Evaluation Quick Guides

Phase 3: Customer Agency & FSSP Discovery

Overview of the Phase

The purpose of this phase is to determine the compatibility of the customer agency's requirements with the FSSP's solution.

	Agency	FSSP	FIT	OMB
3.1 Prepare & sign Inter-Agency Agreement (IAA) for the Discovery Phase, inclusive of sub-section of Terms and Conditions from FAME	L	C	A	
3.2 Hold Discovery kick-off meeting	C	L	A	
3.3 Conduct Discovery	C	L	A	
3.4 Hold regular status meetings with FIT and OMB	C	C	L	A
3.5 Prepare & submit <i>Gap Analysis Register</i> to FIT	C	L		
3.6 Prepare & submit <i>Discovery Report</i> to FIT	L	C		
3.7 Prepare & submit <i>Lessons Learned</i> document to FIT	L	L		
3.8 Begin <i>Implementation Readiness Checklist</i>	L	L	A	



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Phase 3: Customer Agency & FSSP Discovery (continued)

	Agency	FSSP	FIT	OMB
3.9 Evaluate <i>Discovery Report (Gap Analysis Register, Implementation Readiness Checklist, Lessons Learned Report)</i> recommending compatibility between customer agency's requirements with the FSSP's solution	A	A	L	
3.10 Provide recommendation to OMB on implementation pairing	A		L	
3.11 Provide concurrence/non-concurrence on implementation pairing based on FIT's recommendation	A		A	L

L = Lead • Organization(s) responsible for completing the activity and engaging stakeholders
 C = Contribute • Provides resources and consults with the Lead to complete the activity
 A = Advise • Stakeholder(s) responsible for providing input and guidance

Key Considerations

- The customer agency and FSSP are required to complete the *Discovery Dashboard* for the regular status meetings with FIT. (3.4)
- FIT will participate in the Discovery process (e.g., oversight, risk mitigation) and mediate dispute resolution (e.g., gap adjudication) between the customer agency and FSSP.
- If, at the end of the Discovery Phase, the customer agency or the FSSP do not express preference to proceed, or OMB does not concur with the implementation, the customer agency will return to Phase 2 of the FAME process.
- While all documents will not be complete at the time the checklist is submitted (e.g., Integrated Project Schedule), the start date of Implementation is contingent upon having a plan, inclusive of dates, to complete all of the documents. (3.8)
- When two leads are designated for a step, each organization is equally responsible for its completion. For practical matters, a document owner must be selected from the integrated project team. (3.8)
- During each phase of the FAME process, FIT reviews customer agency artifacts, makes a recommendation to OMB, and OMB provides concurrence/non-concurrence. If a customer agency would like to appeal FIT's recommendation and/or OMB's decision, it may do so by working with FIT to bring it to the Executive Oversight Committee within the Financial Marketplace Governance structure.
- Though most major process steps noted above may conclude before the next one begins, depending on the circumstances, some steps may execute concurrently.