Project & Portfolio Management

IT Project & Portfolio Office
(ITPPO)
BPAG Meeting – 3/13/09
# Portfolio vs. Project Management

<table>
<thead>
<tr>
<th>Portfolio Management</th>
<th>Project Management</th>
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<tbody>
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<td>• Where should IT investments be made?</td>
<td>• How do we get a project done:</td>
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<td>• What projects should we work on?</td>
<td>– On time?</td>
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<td>• Are projects aligned with institutional strategies?</td>
<td>– Within scope?</td>
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<td>• How do we make sure we don’t accept more projects than we have time/people to do?</td>
<td>– Within budget?</td>
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<td>• How do we keep stakeholders informed on project progress?</td>
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<td>• What tools can we use to manage my projects and tasks?</td>
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<td>• How do we make sure the end result meets original project expectations?</td>
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How Does The ITPPO Fit In The Consolidated IT Organization?

Michael Young
President
The University of Utah

Steve Hess
Campus CIO

Joe Taylor
Executive Director

ITPPO

ACS
What is the Scope of the ITPPO?

- All campus IT projects will be governed by the Project and Portfolio initiative.

- Health Sciences Infrastructure projects will also be included in the ITPPO initiative.

- Other Health Sciences projects will be governed separately but using the same methods and processes.
How Do We Capture Ideas?

• Ideas for new projects may come from anywhere in the University.
  – Administrative offices
  – IT offices
  – Users
  – Product Managers
  – etc.

• All ideas will be captured but will not necessarily become a project.
How Does An Idea Become A Project?

• After collecting some basic information about the idea, it will be reviewed for:
  – For completeness of basic information,
  – For meeting minimum criteria for being a project,
    • 80 hours or more
  – For determining if a solution already exists,
  – etc.

• Upon completion of the review, appropriate ideas become projects.
Project vs. Non-Project Work

• Projects will be worked through the processes described in this presentation.

• Non-Project work will be handled under the discretion of the appropriate IT group and their customers – much as it is today.
How Does A Project Get Prioritized And Approved For Work?

• Scorecards, designed to show alignment with strategic objectives, are completed and reviewed by the Portfolio Team.

• Projects are ranked by the score and then prioritized based on discussion and input from the Portfolio Team, including a resource capacity analysis.

• Only projects that fit within the capacity are approved for work.
What Happens To Projects That Don’t Get Approved?

• Unapproved projects remain on the list and are continually prioritized at each portfolio meeting.

• Whether a project is approved or not, regular communication will be maintained between the project requestor and portfolio manager.
Once Approved, How Will The Work Proceed?

- A Project Manager will be assigned either from the ITPPO or from somewhere in the IT organization.
- A project management methodology will be utilized
  - Project Initiation
  - Project Planning
  - Project Execution
  - Project Closure
So What is UPlanIT?

• UPlanIT is a web-based software package used to facilitate:
  – Demand Capture and Management
  – Portfolio Management
  – Project Management
  – Portfolio and Project Reporting

• All Campus and Health Sciences IT portfolios and projects will be managed in UPlanIT.
How Can I Learn More?

• IT Project & Portfolio Office (ITPPO) Website
  www.acs.utah.edu/ppo

• uPlanIT Executive Dashboard
  https://www.acs.utah.edu/uofu/fin/UPlanITDashboard
  ...or navigate from the ITPPO Website or CIS

• Address questions to:
  – Rene Eborn – 1-3875 or reborn@acs.utah.edu
  – Kimball Lovin – 1-6025 or klovin@acs.utah.edu
  – Joe Taylor – 1-3325 or jtaylor@acs.utah.edu
Questions & Discussion