IT Portfolio Management

Release: 1.4   Date: 1/7/10
Owner: Portfolio Management Office

Service Description

The AITS Portfolio Management Office (PMO) provides financial, technical, and management personnel with a knowledge and understanding of the theories, concepts, and disciplines of portfolio management. The service also includes training and support for the use of the Clarity Portfolio Management software tool in order to improve the planning, budgeting, and management of IT, especially IT investments.

AITS PMO provides expert advice, formal education/training, extensive documentation and personal instruction on the underlying theories and concepts of project and portfolio management and the use of the supporting software tool to assist in the management of IT investments over their life cycle.

The PMO facilitates the Information Technology Priorities Committee (ITPC) process through which projects are submitted for consideration, reviewed, approved/rejected, scheduled and monitored throughout execution. The PMO reports on project status across the portfolio of all projects. The PMO also acts as a clearinghouse for performance measurement by reporting on organizational metrics, project portfolio metrics and progress toward strategic goals. Portfolio Management is divided into two parts:

 Project Management

- Establish and maintain project management standards for AITS.
- Provide project management and PM tool training for AITS.
- Perform initial setup of projects in Clarity. Create an initial project plan from ITPC template and apply resource roles and the initial budget from the template. Once the project is handed off to a project manager, continue to assist with project plan set up and other Clarity project configuration.
- Work with the Software Process Engineering Group to maintain an integrated Project Management Lifecycle and Software Development Lifecycle.
- Be a resource for the project managers regarding the project management lifecycle and AITS elements and deliverables.
- Participate in the Project Kick-off meetings.
- Meet monthly with the project manager to review the project plan and proof task dates, ETCs, resource assignments and other project status information. Assist with modifications to the project plan in Clarity if necessary.

- Facilitate communication between organizations regarding project responsibilities and resource requirements.
- Assist as needed with project close-out activities.
- Survey clients regarding satisfaction levels.
- Maintain PMO website as a source of information for project managers and others providing project management standards, project plan templates, deliverable templates and examples and project status information.

Portfolio Management

- Facilitate the ITPC process by managing the flow of project templates through the review process.
- In conjunction with the functional ITPC subcommittees, provide project prioritization to guide the scheduling of approved projects. Working with the other UA IT groups, schedule projects based on priority and resource availability.
- Maintain the ITPC website to ensure process transparency and provide project information throughout the university.
- Manage ITPC project funding and financial reporting.
- Provide periodic status reporting on all projects in the ITPC portfolio.
- Administer the Clarity project and portfolio management software for the university and facilitate further development of the tool.
- Maintain schedule of internal AITS projects.
- Consolidate selected performance metrics from across AITS for publication on a periodic basis.
- Report on activities and progress toward AITS strategic initiatives.
- Be a leader for resource and capacity management for the organization.

Hours of Availability

Portfolio Management Office Services are available from 8:00 a.m. to 5:00 p.m., Monday through Friday, except for University of Illinois holidays

Customer Responsibilities

- Contact the AITS Service Desk to schedule an appointment for Portfolio Management Consulting services
- Request a license to use the Clarity Portfolio Management tool

How Do We Charge?

This service is available upon request. Pricing and agreements will be worked out with each customer depending on the desired level of support.

**Our Service Catalog is based on material that was developed by The State of North Carolina's Operational Excellence Program's Service Catalog and adapted with their permission. **

DOCUMENT OWNER/APPROVAL

Service Catalog Owner: Cynthia Cobb

Concurrence:

Service Catalog Owner	Date

Computer Operations Engineering	Date

Approval:

Associate Vice President - AITS	Date

REVISION CONTROL

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Date	By	Action	Pages
12-9-09	Rita Bates	Acknowledging North Carolina's work	2
1-4-10	Rita Bates	Removing COE from front cover and revising OLA's to SLA's	1-3
1-7-10	Rita Bates	Revise layout	1-3

REVIEW/APPROVAL HISTORY

This service catalog shall be subject to a review on an annual basis.

Date	By	Action	Pages
5-30-13	Cynthia Cobb	Replaced Kelly Block's name with Cynthia Cobbs.	3