ITS Portfolio Review

The business side of the IT side of the business
Today’s Presentation

- Describing ITS’ Work
- Components of a Portfolio
- The What, Why, and How of Portfolio Management
- Group Exercise, Discussion
- Questions
A Quick Glimpse of ITS
Design Components of ITS

DLs  Services  Customers

LitS
Change Is Normal

Portfolio Mgmt is Necessary
Once You Get Started, You’ll Rely on Great Strategy More Than Great Plans

Don’t Reinvent The Wheel

Assumptions Are Deadly
The Principles of Aikido apply to change. Learn to receive, channel, and direct the energy that comes back to you.

Change is neither a race nor a sprint; periodically refresh yourself to pick up your work anew and to the best work possible.
In the eye of the storm it’s hard to see what might be clear to others. Take time to reflect, to undertake mini-reviews.

Use external advisers and customers to validate progress and to expose issues.

What you learn becomes one of your greatest assets.
- Plans won’t be perfect the first time around. Or the second. Quite possible, even the third. This is okay.

- Rapid iteration (a.k.a., “learning to fail quickly”) gets you to success more effectively.

- Iteration brings depth to your strategy (sense a theme that suggests big bang is a bad idea?)
Ann Richards got it right — at some point, you gotta call it “done” and stick a fork in it.

With Version “1.0” done, you can move into the process of continual improvement.
Four Portfolio Components

- People
- Assets
- Services
- Initiatives

Of these, which is the single largest component? Which is the least variable?
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Now

IT Initiative Portfolio

Then

How We Get There

UC Santa Cruz
IT Initiative Portfolio

What Is It?
- Addresses problem or opportunity
- Creates deliverables

Benefits, Risks?
- What benefits are delivered?
- What risks have to be managed?

Measures
- Alignment
- Posture
- Planning Horizon
- Timeframe
- Cost

Discuss Measures - what they are, why they might be important
Initiatives prioritized and forwarded to for review

ITS prioritizes and balances overall initiative inventory

Governance A
Governance B
Governance C
Governance D
Governance “N”

Yes!
Maybe…
Low Priority
Ready To Define The Future State

People

Assets

Services

Prioritized Initiatives
Do We Have the Right People Performing the Right Services at the Right Levels?

Balancing the ITS Portfolio is an Iterative Process that Starts With The Existing Mix

Portfolio Balancing
Defining the right balance involves alignment* and fiscal balancing

*The Overall Portfolio Should Be Aligned to UCSC’s Objectives and Priorities
Step 1
Step 2
Step 3

Once We Have the Portfolio Determined We Make Our Budget Submission

The Resulting Mix Prepares Us for the next Academic Year

People
Assets
Services
Initiatives
Now It’s Your Turn

Brief Discussion Exercise
Report Out
Observations
Question
Take 15 Minutes to…

- Individually consider how you’d spend $2M for this class...something you think the class would value
- Present your ideas to your team
- Devise criteria for deciding which is best
- Be prepared to report your decisions/process
Thank you!

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