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
Three Initial Questions

- How many of you feel you’re getting the classes you need to graduate in a timely way?
- How many of you feel you have enough wireless access points around campus?
- How many of you feel the campus provides you with good tools to collaborate virtually?
A Quick Glimpse of ITS
Design Components of ITS
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.
Assess

- 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**?
Four Portfolio Components

- People
- Assets
- Services
- Initiatives

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

ITS Current State

IT Initiative Portfolio

ITS Future State

Then

How We Get There

People | Assets
---|---
Services | Initiatives

People | Assets
---|---
Services | Initiatives
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
Governance A
Governance B
Governance C
Governance D
Governance “N”

Initiatives prioritized and forwarded to for review

ITS prioritizes and balances overall initiative inventory

Yes!
Maybe…
Low Priority
Ready To Define The Future State
Key Principles for ITS Budget Planning

- Align campus and divisional service levels to highest campus academic priorities
- Preserve the integrity of campus operations
  - Risk, Compliance, Security
  - IT Infrastructure
- Sustain mission critical business systems
Balancing the ITS Portfolio is an Iterative Process that Starts With The Existing Mix

Do We Have the Right People Performing the Right Services at the Right Levels?
*The Overall Portfolio Should Be Aligned to UCSC’s Objectives and Priorities

Defining the right balance involves alignment* and fiscal balancing

*The Overall Portfolio Should Be Aligned to UCSC’s Objectives and Priorities
Once We Have the Portfolio Determined We Make Our Budget Submission.

The Resulting Mix Prepares Us for the next Academic Year.
IT Portfolio Management Step-by-Step
Unlocking the Business Value of Technology
Maizlish and Handler, John Wiley and Sons, 2005

IT Governance
How Top Performers Manage IT Decision Rights
Now It’s Your Turn

- Brief Discussion Exercise
- Report Out
- Observations
- Question
Take 15 Minutes to...

- Individually consider how you’d respond to a specific technical initiative for the campus (set up on next slide)
- Present your ideas to your team
- Devise criteria for deciding which is best
- Be prepared to report your decisions/process
What Will You Decide?

▶ Good news! The Campus Provost has found pocket change.

▶ He’s going to provide ITS with $250,000 to address an important IT initiative.

▶ He wants you to ensure that the money is spent in the wisest way possible.

▶ What do you recommend, and why?
Thank you!