

## Case Study

# PORTFOLIO AND PROJECT MANAGEMENT: UNIVERSITY OF UTAH DEVISES A PARALLEL STRATEGY FOR SUCCESS

## About the University of Utah

The University of Utah is the state's oldest and largest institution of higher education and is a major research university. It offers more than 100 undergraduate and more than 90 graduate degree programs to over 28,000 students. The University of Utah is one of the state's largest employers and is ranked as one of the top public research universities in the nation.

## The Challenge

In light of recent economic events, the University of Utah believes that higher education not only has significant influence in directing the outcome of some of the complex issues facing organizations in these times by teaching accountability, but in addition, wants to demonstrate accountability with the optimization and management of its own funds. Technology investments and IT departments are often recipients of major funds, yet not all colleges or universities have the processes in place to efficiently analyze and prioritize IT investments or projects and ensure they are properly aligned with the mission of the organization as a whole.

As one of the state's largest employers and one of the top public research universities in the nation, the University of Utah accepted the challenge of demonstrating accountability by enhancing its IT business models. During 2008, it conducted an informal IT assessment and the results indicated possible areas for growth and improvement for the University.

Among other things, it was managing more than 1,700 projects. It was apparent that it needed a systematic approach to the prioritization of IT initiatives, a centralized project management approach, and the ability to gain IT visibility – all for improved IT governance. A strong project and portfolio management process could inherently help enhance its IT governance system by including key stakeholders in multiple business units in its decision making and prioritization process, thus minimizing risk.

"Our goal was to get the right people, at the right time, working on the right initiatives and have them communicate with each other," explains Rene Eborn, assistant director in the Office of IT at the University of Utah. "The shared information could be tracked and reported to decision makers. Our objective was to prioritize technology initiatives so that they could be implemented using the project management methods." It was determined that the most effective method to achieve this was to implement a Project and Portfolio Management (PPM) process.

The University of Utah's Office of Information Technology funded the IT Project & Portfolio Office (IT PPO) to facilitate the initiative. Eborn says she received high-level sponsorship from the president, CIO and others. "It was critical to enable them to have input in the direction of the IT PPO and they were an integral part of the decision-making process," she says. "Further, leveraging the experience of our institutional and vendor partnerships helped us overcome natural barriers to change management and user adoption."

Research conducted by the IT PPO suggested that due to the scope of the endeavors, it should either implement portfolio management or implement a standard project management methodology. Yet, it was decided that the institution equally needed both. It therefore formulated a plan to implement a complete PPM process in parallel, with an aggressive timeframe of only 10 months.

## The Planview Solution: Implementing Parallel Strategies

As a case in point, the IT PPO applied the proposed structured project methodology to its own initiative. An appropriate project manager, project sponsor, and stakeholders were identified and interviewed to determine potential portfolio and project objectives. The portfolio process involved high-level administration who would be most interested in the general portfolio data to make informed business decisions. The project management methodology was of value to project managers who require more detailed information to run day-to-day operations. High-level leaders then helped the PPO define various portfolio areas within the university's three

### CUSTOMER:

The University of Utah

### INDUSTRY:

Education

### GEOGRAPHY:

North America

### USES PLANVIEW ENTERPRISE TO:

Align IT spend with the mission of the entire organization to increase accountability and optimize fund management, and consolidate IT projects being managed 95%, from 1,700 to 76

*"We chose Planview Enterprise based on its exceptional reporting capabilities and the company's ability to consult and partner with us to ensure a smooth implementation."*

**Rene Eborn**  
Assistant Director, Office of IT  
University of Utah

IT investment categories: services, solutions and infrastructure. It then established four simple yet critical steps that every subsequent project would have to follow: Project Initiation, Project Planning, Project Execution, and Project Closure.

“With objectives outlined and a process in place, we were able to establish a pilot and case study for others to follow, always ensuring our sponsors were apprised of progress and issues,” says Eborn. “The PPO ensured both parallel initiatives, portfolio and project management, were working well together and in doing so, found we needed a tool that would bring our tandem efforts together to improve visibility and track and centralize data in one place. Therefore, a third component was added – an enterprise project and portfolio information system. We organized a cross-divisional team to identify basic tool requirements. After an extensive research and RFP process, Planview Enterprise® was chosen based on its exceptional reporting capabilities and the company’s ability to consult and partner with us to ensure a smooth implementation.”

## The Strategy Pays Off

After approximately 18 months of aggressive effort, the IT PPO has consolidated the volume of projects being managed 95 percent, from 1,700 to only 76, due to its ability to utilize the prioritization process to identify redundancy and streamline efforts.

“The project management methodology gave us an enhanced IT governance model with the implementation of a centralized portfolio/project information system that provides real-time data to stakeholders,” explains Eborn. “This data promotes visibility and enables our leadership to be accountable and make integrated informed decisions. Portfolio management teams have clear team operating agreements. These teams developed strategic objectives and values, and regularly discuss IT initiatives, prioritize projects, rank investments, and make integrated informed decisions.”

Eborn says project managers now have access to detailed workflows, timelines and reports for better insight into project status and project workloads are aligned with strategic goals. Project managers can communicate and plan with resource managers. Resources are thus better allocated and forecasted.

“We have trained our entire IT organization on the foundation of project management, adopted a project management methodology that increases our maturity level, and are currently working on projects and initiatives that are prioritized by our portfolio teams,” says Eborn. “Implementing a large initiative with focus on change management, takes time; however, because of the institutional and vendor partnerships potential barriers were reduced, and the University aggressively moved toward an enhanced IT governance structure.”

## Future Strategy

In this current economic climate, the University of Utah is anticipating receiving government stimulus funding. In its efforts to be accountable to its students, patients, and partners, the University is committed to continually investing in the improvement of its portfolio and project management maturity, utilizing a portfolio/ project management information system to improve IT visibility and governance, and providing the leadership teams with the data to integrate and make informed decisions nimbly.

“It’s important to do the right things, at the right time with the right people,” concludes Eborn. “As an institution of higher education, we are responsible for not only teaching accountability but, we need to also demonstrate our commitment in striving to do better within our own organization and accurately reporting to our constituents.”

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