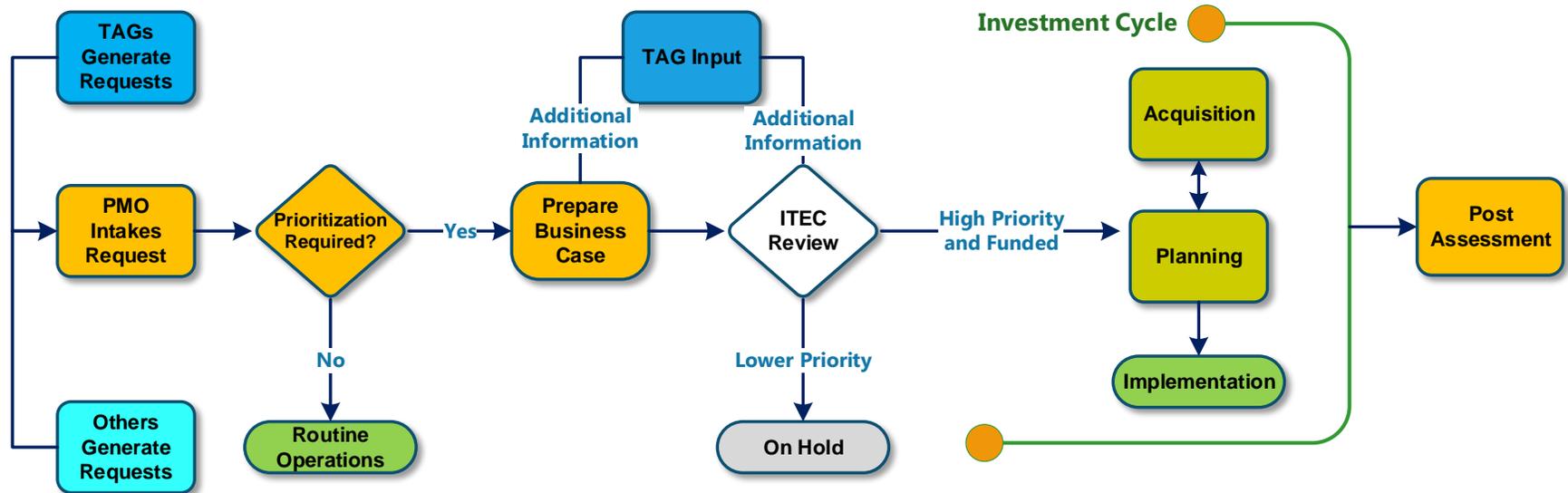## Process Overview

1. Requests for investment come into the Portfolio Management Office (PMO)—a function reporting to the CIO.

   Examples of investment requests include PeopleSoft enhancements, software integrations for new products, classroom modernizations, or new support services.

2. Relying on knowledge of institutional strategic objectives and priorities, the PMO prioritizes and processes the majority of requests without consultation.

   Any request that can be delivered within a reasonable timeframe and existing budget does not need prioritization. Requests that require additional resources or funding, or requests that can only be delivered at the expense of other investments, or that have risk implications of significant concern, are sent to ITEC for review.

3. The PMO prepares requests for ITEC review.

   The PMO works with requestors to write a one-page business case summarizing the cost, benefit, risk and alignment of the investment at a high level, requiring about two hours of time to develop.

   The PMO works with the appropriate TAG team for Subject Matter Expert (SME) input to inform the business case.

4. The PMO presents investment business cases to ITEC.

   The PMO explains the costs, tradeoffs, and risk implications of individual investments and the IT capacity to complete them. Requestors may attend the ITC meeting to supplement the written business case with personal narrative explaining the need.

5. ITEC reviews requests for investment of time or funding and decides investment strategy by:

   a. Consulting with TAG team or otherwise requesting additional information.
   b. Determining high priority and authorizing funding to proceed with investment.
   c. Determining low priority and holding until capacity and higher priorities allow.

6. Solutions that have been authorized and funded enter the investment cycle of planning, acquisition if appropriate, and implementation.

   Investments can be suspended or halted in favor of higher priorities.

7. Following implementation a post assessment is conducted to evaluate performance and results.