

To: CIOs/IT Managers at all Executive Branch Agencies/Boards/Commissions

Good Afternoon,

CMS BCCS is on target to rollout the Enterprise Program Management (EPM) Portal to Executive Branch agencies, boards and commissions on September 30, 2008. With this in mind, we need to prepare you to utilize the EPM Portal.

There are two roles that you need to prepare for at your organization – Portfolio Manager and Project Management Office. Your organization should establish resources for these roles, in order to coordinate your organizations' project portfolio and work of agency Project Manager with BCCS Leadership and EPMO.

Role Definitions:

Agency Portfolio Manager - This role is responsible for coordinating their organization's project portfolio (database of proposed projects). The agency Portfolio Manager 'manages' their organization's portfolio from Portfolio Record Creation through Project Activation and to a lesser extent through Project Completion. They serve as the primary point of contact between their organization and BCCS Leadership, including the Enterprise Program Management Office (EPMO), by participating in the identification, processing and qualification of projects that support their respective organization. The Portfolio Manager also facilitates decisions by their leadership team and provides the requisite data and artifacts necessary to enable timely processing of their proposed projects, in essence 'owning' the lifecycle for projects within their respective organization. The Portfolio Manager's predominate focus is during the Governance and Qualification & Activation processes. The 'Primary' Portfolio Manager is simply the default person assigned to this role within a given agency.

Project Management Office (PMO) - An agency PMO is responsible for coordinating the work of agency Project Managers with BCCS Leadership, including the Enterprise Program Management Office (EPMO), to effectively manage approved projects throughout their lifecycle. They are responsible for assisting the Portfolio Manager in a) defining Technical Specification for any procurements; b) assembling requisite information to define Levels 0 through 3 of the Work Breakdown Structure (WBS) in accordance with EPMO standards. This information includes Level 0) Project Title, Level 1) Business Capabilities, Level 2) Major Milestones (or Scope) and Level 3) Specific Deliverables; c) identifying and monitoring project commitments and conducting impact assessments to support change management; and d) assisting the Portfolio Manager and the EPMO to close or cancel projects, as appropriate. The PMO's predominate focus is during the Qualification & Activation and Project Management (Planning/Execution/Transition) processes. The 'Primary' PMO is simply the default person assigned to this role within a given agency.

EPM Portal Registration Process:

Registration will be processed via the 'BCCS Contact Information' form. You can download the form and instructions at: http://bccs.illinois.gov/forms_admin.htm. Please review the form and instructions thoroughly to ensure you complete entirely. Completed (approved & signed) forms should be submitted to the Agency Relations mailbox at: CMS.BCCS.AgencyRelations@illinois.gov by **Friday, September 19**. There is no predefined limit, but we request a minimum of at least one person assigned to each role (Portfolio Manager & Project Management Office) for each entity.

Registrants will receive verification via email when their account is set up in the EPM Portal from the EPMO. If users encounter technical difficulties with the EPM Portal, please email the EPM SharePoint support mailbox at: CMS.EPM.Framework@illinois.gov.

Hands-On Training:

We will be offering two, specific half-day training classes for the new Agency participants; one for Agency Portfolio Managers, and different one for Agency PMO designates. The classes will be held at one of the Computer Labs at the LLCC Capital City Training Center. Our plans are to offer a morning and an afternoon session on the following dates:

- Portfolio Manager role: Tuesday and Wednesday, **October 7th & 8th**
- Project Management Office role: Tuesday and Wednesday, **October 28th & 29th**

Note: All users of the system must attend training, prior to obtaining access to the EPM Portal system.

Additional details to follow on the training registration process. If you have specific questions regarding the training, please contact Barry Vaughn at Barry.Vaughn@illinois.gov or 217-785-4534.

We will reach out to you soon to confirm the rollout the EPM Portal and to inform you how to register for the training. In the meantime, if you have questions or concerns please feel free to contact me.

Thank you,

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