

My Portfolio

Portfolio Summary

Portfolio

Board

Timeline

Dashboard

Portfolio Summary

Portfolio

Board

Timeline

Dashboard

A	Portfolio	Item	Status	Overall Health	Schedule Health	Financial Health	Budget	Benefits	Estimated Cost	% Done (Status)
	Portfolio	Cloud and Mobile First	Active	On Track	On Track	On Track	\$1,703,889.44	\$1,251,250.00		100%
	Program	Mobile Data Customer Support	Active	On Track	At Risk	On Track	\$1,044,150.04	\$1,126,000.00		100%
	Project	Support Customer using Mobile	Active	On Track	Off Track	On Track	\$100,700.00	\$400,000.00	11/11/2021	100%
	Project	Implement in-park applications...	Active	At Risk	At Risk	Off Track	\$202,340.07	\$100,000.00	12/31/2021	100%
	Project	Service interface to support de...	On Hold	At Risk	On Track	On Track	\$107,239.00	\$100,000.00	01/01/2022	100%
	App	Features	Proposed	On Track	On Track	On Track	\$110,000.00	\$700,000.00	06/06/2022	100%
	App	Transfer the dashboard web in	Active	At Risk	On Track	Off Track	\$201,000.00	\$100,000.00	06/30/2021	100%
	Project	CRM Upgrade	Proposed	On Track	On Track	On Track	\$100,000.00	\$100,000.00	12/31/2021	100%
	Program	Improve Infrastructure	Active	On Track	On Track	At Risk	\$2,000,000.00	\$4,000,750.00		100%
	Project	Web Page	Active	On Track	On Track	On Track	\$117,140.00	\$400,000.00	06/25/2022	100%
	Project	Project Connect	Active	On Track	On Track	On Track	\$170,440.00	\$100,000.00	06/30/2021	100%
	Project	Project for the web	Active	On Track	On Track	On Track	\$12,500.00	\$120,000.00	09/30/2021	100%
	Project	Power	Active	On Track	On Track	On Track	\$100,000.00	\$400,000.00	11/01/2021	100%
	App	Native Chat/Op	Active	On Track	On Track	On Track	\$100,000.00	\$100,000.00	01/01/2022	100%
	App	App	Active	On Track	On Track	On Track	\$100,000.00	\$100,000.00	06/06/2022	100%
	Project	CRM Platform	On Hold	Off Track	Off Track	Off Track	\$100,000.00	\$1,000,000.00	12/31/2021	100%
	Project	Microsoft Teams Integration an...	Active	At Risk	At Risk	At Risk	\$200,490.00	\$25,750.00	09/14/2022	100%
	Project	AI for remote Weather Station	On Hold	On Track	At Risk	Off Track	\$400,000.00	\$1,400,000.00	12/31/2021	100%
	Project	Server Upgrade	Active	At Risk	At Risk	On Track	\$204,700.00	\$110,000.00	01/01/2022	100%
	Program	Mobile Applications	Active	On Track	On Track	On Track	\$1,044,040.00	\$1,700,000.00		100%
	App	New Customer Support Portal	Active	Off Track	On Track	Off Track	\$107,500.00	\$110,000.00	06/06/2021	100%
	Project	Improve User Experience	Active	On Track	At Risk	On Track	\$100,750.14	\$100,000.00	01/01/2022	100%

# Portfolio Planner

**Robert Lee Wyatt, Sandra Looper**



## **Portfolio Planner:**

**Portfolio Planner** Julia Jasmine, 1995-07 Provides teachers with a user tested prepackaged step by step portfolio assessment method Event Portfolio Planning and Management Vassilios Ziakas, 2013-10-23 Cities and regions around the world increasingly capitalize on a series of events aimed at optimizing their reach and outcomes How then can a series of different events be developed and harnessed What are the conditions and the means by which synergies and collaboration among different events and their stakeholders can be fostered This book for the first time explores how managers and host communities can synergize sport cultural and other planned events in a portfolio in order to attain magnify and sustain their outcomes The incorporation of different events into a portfolio requires an integrative way of viewing the different community purposes that they serve in unison This book elaborates on this holistic approach by developing an integrative theoretical framework for conceptualizing event portfolios and examining their challenges and prospects as well as potential as tools for sustainable development It therefore presents the foundations of event portfolio planning the patterns of inter organizational relationships within collaborative events networks that foster the conditions for community capacity building and the requirements for the design and development of event portfolios Topics are considered from varying perspectives and examples of emerging event portfolios from a range of geographical regions are integrated throughout Uniquely providing a holistic framework for planning and managing a series of events this is essential reading for all those interested in Events Policy Planning and Management **Project Portfolio Management Tools and Techniques** Parviz F.

Rad, Ginger Levin, 2006 Does your organization want to achieve success in prioritizing projects systematically deliberately and logically Project Portfolio Management Tools and Techniques is written to demonstrate how to elevate your organization's project management thinking to the level beyond managing individual projects in a standalone fashion This book is for those executives and other project professional who strive to have a formalized system of authorizing the right projects and abandoning the wrong projects who desire to spend resources in the most efficient manner and who want to have an actionable strategic plan for improving organizational project management sophistication Project Portfolio Management Tools and Techniques deals with the full spectrum of project portfolio management PPM functions from selecting projects through formalized portfolio management processes to facilitating the successful execution of projects through creating a formalized project friendly environment This book will aid you in the implement of a PPM system assist in gaining the necessary commitment from executive management and provide guidelines for the modification of operational practices Get ahead of the game by seeing a comprehensive project portfolio model that can help you establish yours successfully

**Technology Portfolio Planning and Management** Oliver Yu, 2007-02-24 From the large overall scope of planning and management of technology Technology Portfolio Planning and Management Practical Concepts and Tools will focus specifically on the concepts and tools for the planning and management of an investment portfolio by a government or a

business organization for either the development or the application of technologies A portfolio is a coordinated combination of technologies that achieve a common objective for the decision maker Thus the book will focus on those concepts and tools for selecting and modifying a combination of technologies that will be either developed by a technology supply organization such as a national laboratory or a corporate research center or adopted by a technology application organization such as a government administrative office or a corporation management department to either advance public goals space exploration or disease eradication or enhance corporate strategies improving productivity or increasing competitiveness

*Planning Competences* Agnes Roux-Kiener, Gilles Vallet, Philippe Rocher, 2025-02-10 html body data pb style L55HOYN justify content flex start display flex flex direction column background position left top background size cover background repeat no repeat background attachment scroll As projects become increasingly technically complex and global involving more functions products geographies and stakeholders Project Planning is more critical than ever as a key success factor This is because Project Planning is essential not only to ensure timely deliveries but also to build trust among all project stakeholders Expertise in this field has become an important criterion for customers and sponsors when selecting their suppliers Having a standard for Project Planning aligned with the IPMA Project Management standard ICB4 enables the professions of Project Planners and Project Managers to collaborate harmoniously using a shared language The people competence elements are identical for both professions as they work together within the same project team Perspective competence elements are similarly aligned although tailored to meet the specific needs of project planning The practice competence elements go deeper into traditional planning aspects and incorporate modern approaches such as forensic planning and agile methods Given the global shortage of Project Planners this standard provides organisations with a model to develop their project planning teams and identify gaps in expertise not only in terms of knowledge but also in skills and abilities For Project Planners themselves the standard serves as a tool for creating their own development plans within the Project Planning profession

**The Portfolio Connection** Susan Belgrad, Kay Burke, Robin J. Fogarty, 2008-04-04 As a new teacher I am always looking for ideas that will make me feel more confident Using a portfolio will help me show evidence that the students are making progress toward meeting state standards Stephanie Jones Teacher Forrest City High School AR A good overview of the entire portfolio process from its philosophical foundations to the celebration of student achievement Michael F Dwyer English Department Chair Otter Valley Union High School Brandon VT Encourage student creativity and academic growth through portfolios and authentic assessment Research and practice show that portfolios are powerful tools for assessing students authentically communicating with parents about the learning process and helping learners across all grade levels and content areas record their successes and take ownership of their learning The third edition of *The Portfolio Connection* offers practical advice and reader friendly strategies for implementing student portfolios in the classroom Through step by step procedures the authors help teachers incorporate standards into the portfolio process by providing expanded checklists

and rubrics to monitor student progress The updated edition also includes Additional information on e portfolios and integrating technology Steps for conducting student led conferences Portfolio examples for children with special needs Guidance on increasing parent involvement Information on the impact of NCLB on student assessment Discover how you can use portfolios to heighten students self reflection while expanding their critical and creative thinking skills *Enterprise Project Portfolio Management* Dr. Richard Bayney,Ram Chakravarti,2012-08-11 This unique guide and professional reference presents a structured framework for practitioners and students of project program and portfolio management to enhance their strategic and analytic capabilities in the evolving discipline of project portfolio management PPM It provides a practical step by step approach to building competencies in categorizing evaluating optimizing prioritizing and managing an IT pharmaceutical biotech or other complex R D oriented portfolio of investments **Portfolio Management (including Security Analysis)** Dr. G. Ramesh Babu,2007 In Indian context Project Manager Competency Development Framework - Third Edition Project Management Institute,2017-05-01 Building on the framework developed in the previous edition Project Manager Competency Development Framework Third Edition extends the framework both vertically to include program and portfolio managers and horizontally to cover continued development for the roles of project program portfolio managers The Project Manager Competency Development PMCD Framework Third Edition Aligns with the PMP Examination Specification Aligns with the PMBOK Guide Fifth Edition Aligns with The Standard for Program Management Third Edition Aligns with The Standard for Portfolio Management Third Edition Builds upon the framework from the second edition knowledge performance and personal competencies in particular the personal competencies Provides examples of evidence required to demonstrate competence Recognizes and addresses the need for career development along a continuum of expertise and experienceThe PMCD Framework is designed so all participants in the project management process are able to assess their current level of project program portfolio management competence The Programme and Portfolio Workout Robert Buttrick,2020-07-16 Implementing change is needed in every business But how do you get started and ensure you actually realize the benefits you need How do you direct and manage the tens hundreds or even thousands of projects and the other pieces of work your business is undertaking How do you make sure everyone is working towards the same goals Building on five previous editions of The Project Workout this book focusses on programme and portfolio management It is a valuable companion for every business executive and programme manager as well as a comprehensive resource for students of business portfolio and programme management The Programme and Portfolio Workout provides practical advice and techniques to direct and manage your business in a structured yet agile way Aimed at both business and programme managers it takes you through different approaches to portfolio programme and project management and shows you how they can work together The practical approach is enhanced throughout with a series of Workouts exercises techniques and checklists to help you put the book s advice into practice The Workouts are supported by an on line resource of tools This

expanded edition contains a wealth of new material on the governance and management of portfolio and programmes including how to work with standards and methods such as GovS 002 ISO 21504 BS6079 and MSP The companion to this book The Project Workout deals with directing and managing individual projects It uses the same concepts and approaches so that you know when directing your portfolio or programme that your project sponsors and managers are taking the same approach Together these books give you what you need to ensure your organization succeeds *Elder Law Portfolio* Harry S. Margolis,1995-12-31 In depth timely and practical coverage of key issues in elder law practice Written by outstanding elder law experts this unique publication is the first place to look for detailed answers to pressing questions concerning Medicaid long term care planning healthcare issues trusts powers and guardianship every facet of today s elder law practice Each portfolio has distinctive title and author The series includes 28 portfolios to date So You Have to Have a Portfolio Robert Lee Wyatt,Sandra Looper,2004 Portfolios are used more and more in the education field This book is user friendly for anyone whether starting a new portfolio or updating an older one A portfolio truly has to reflect the owner and this book helps to show how that can be done Karen K Coblenz PrincipalDassel Elementary Dassel Cokato Schools Minnesota This practical yet thoughtfully prepared book is a worthwhile text and an excellent primer for teacher educators involved in familiarizing teacher candidates about portfolio development and assessment Orest Cap Professor of EducationUniversity of Manitoba Demystify and simplify the process of creating a high impact professional portfolio From getting the grade to getting the job portfolios have become an important aspect of assessment and professional development within education Yet many teachers and prospective teachers are left stranded without the guidance and tools needed to prepare and present a powerful professional portfolio This must have guide offers comprehensive yet concise tips plus a practical approach centered on the simple CORP collection organization reflection and presentation concept to alleviate the anxiety and frustration often associated with the process Expanding upon the popular first edition this updated version boasts the following new features A new chapter on Electronic Portfolios including the pros and cons and numerous online resources A new chapter on creating a specialized portfolio for National Board Certification Even more user friendly tools including additional activities questions reflections and examples The indispensable information is coupled with practical tools for easy implementation including checklists templates forms guidelines protocols and sample rubrics *Vertical Brand Portfolio Management* Diederich Bakker,2014-12-01 Diederich Bakker develops a comprehensive planning process that can guide brand manufacturers in assessing the internal and external environment The step by step planning process includes strategies to thoroughly audit brand portfolios and to review an organisation s brand management capabilities The planning process aides brand manufacturers in assessing product categories and in determining retailers for their suitability as cooperation partners The proposed Vertical Brand Portfolio Management is based on the principles of brand portfolio strategy assigning clear roles for all brands including private labels Instead of fighting the retailer products brand

manufacturers are encouraged to cooperate with retail partners by offering vertically integrated brand portfolios Based on numerous international case studies the author offers brand manufacturers and retailers practical tools to consider collaborations in the production and management of private labels      **Strategic Plan** Climate Change Technology Program (U.S.),2006      **Integrated Resource Plan, TVA's Environmental & Energy Future** ,2011      The Handbook of Project Portfolio Management Dennis Lock,Reinhard Wagner,2018-10-09 Managing large and complex organizations balancing the needs of business as usual new products and services and business change assuring risk across everything the business does these are all core requirements of modern business which are provided by the discipline of portfolio management The Handbook of Project Portfolio Management is the definitive publication that introduces and describes in detail project portfolio management in today s ever changing world The handbook contains the essential knowledge required for managing portfolios of business change with real life examples that are being used by today s organizations in various industries and environments The team of expert contributors includes many of the most experienced and highly regarded international writers and practitioners from the global project portfolio management industry selected to provide the reader with examples knowledge and the skills required to manage portfolios in any organization Dennis Lock and Reinhard Wagner s definitive reference on project portfolio management explains the context and role of the discipline the practical processes tools and techniques required for managing portfolios successfully the capability required and how to develop it The text also covers the recognized standards as well as emerging issues such as sustainability and environment Collectively this is a must have guide from the leading commentators and practitioners on project portfolio management from across the world      *Portfolio Management* John Bonner,Marcus Rees,Edward Ivanovic,2015-05-01 Investing can seem simple but there are an infinite number of ways to get to your goals and an infinite number of ways to fail To sharpen your investment skills this book guides you through the key aspects of the fund management profession working from a macro industry overview to the micro details of security valuation techniques combining the benefits of academic experience with decades of industry experience This is something also found in the complementary online Market Class investment simulator where you can manage a 100m fund in a dynamic market and your decisions and those of fellow fund managers make the market A smart investor doesn t rely on luck or guts but on learning as much as possible to make the best decisions Portfolio Management and Market Class with their uniquely rich insight into the real life workflow of portfolio management are a vital component in any investor s education      *IT (Information Technology) Portfolio Management Step-by-Step* Bryan Maizlish,Robert Handler,2005-04-28 Praise for IT Portfolio Management Step by Step Bryan Maizlish and Robert Handler bring their deep experience in IT value realization to one of the most absent of all IT management practices portfolio management They capture the essence of universally proven investment practices and apply them to the most difficult of challenges returning high strategic and dollar payoffs from an enterprise s IT department The reader will find many new and rewarding insights to making their IT

investments finally return market leading results John C Reece Chairman and CEO John C Reece Associates LLC Former deputy commissioner for modernization and CIO of the IRS IT Portfolio Management describes in great detail the critical aspects know how practical examples key insights and best practices to improve operational efficiency corporate agility and business competitiveness It eloquently illustrates the methods of building and integrating a portfolio of IT investments to ensure the realization of maximum value and benefit and to fully leverage the value of all IT assets Whether you are getting started or building on your initial success in IT portfolio management this book will provide you information on how to build and implement an effective IT portfolio management strategy David Mitchell President and CEO webMethods Inc I found IT Portfolio Management very easy to read and it highlights many of the seminal aspects and best practices from financial portfolio management It is an important book for executive business and IT managers Michael J Montgomery President Montgomery Co IT Portfolio Management details a comprehensive framework and process showing how to align business and IT for superior value Maizlish and Handler have the depth of experience knowledge and insight needed to tackle the challenges and opportunities companies face in optimizing their IT investment portfolios This is an exceptionally important book for executive leadership and IT business managers especially those wanting to build a process managed enterprise Peter Fingar Executive Partner Greystone Group coauthor of The Real Time Enterprise and Business Process Management BPM The Third Wave A must read for the non IT manager who needs to understand the complexity and challenges of managing an IT portfolio The portfolio management techniques analysis tools and planning can be applied to any project or function Richard Max Maksimoski Senior Director R D The Scotts Company This book provides an excellent framework and real world based approach for implementing IT portfolio management It is a must read for every CIO staff considering how to strategically and operationally impact their company s bottom line Donavan R Hardenbrook New Product Development Professional Intel Corporation

**Project Portfolio Management** Harvey A. Levine, 2010-09-29 Project Portfolio Management PPM goes beyond the typical project management approach to offer a set of proven business practices that can help executives program managers and project managers bring projects into alignment with the strategies resources and executive oversight of the overall enterprise Step by step this book shows how to take a project from the inception of a vision to the realization of benefits to the organization Project Portfolio Management draws on project management expert Harvey A Levine s years of research and distills the knowledge and best practices from dozens of leaders in the field to show how to select and implement the projects that will garner the best results Throughout this important resource Levine tackles the many challenges associated with PPM including Ranking value and benefits Determining the size of the portfolio pipeline Assessing the impact of uncertainty on projects and portfolios Understanding the benefit and risk relationship Establishing a portfolio governance capability Managing the portfolio to maximize benefits Implementing PPM *The Perfect Portfolio* Leland B. Hevner, 2009-03-23 Today s world of personal investing is not a friendly place Individuals are assaulted with an



unending barrage of financial news expert advice investing tools trading systems and more to the point where they are overwhelmed As a result most people simply entrust their portfolios to third party advisers and in doing so lose control of their financial security Nobody is more familiar with this situation than author Leland Hevner As President of the National Association of Online Investors naoi.org and a longtime educator in this field he understands that to succeed in today's chaotic markets you don't need more news advice or analysis tools Instead you need a completely new and simpler approach to building an effective portfolio on your own one that includes updated investing concepts and dramatically new ways of looking at the market That's why he created The Perfect Portfolio Written in a straightforward and accessible style this reliable resource shows you step by step how to use a revolutionary approach to investing called the Perfect Portfolio Methodology PPM Developed by Hevner over the course of his successful career and based on input from hundreds of individual investors the PPM allows you to capture incredible returns under any market condition without exposing yourself to unacceptable risk or requiring you to devote an extraordinary amount of time to the investing process The journey to creating your unique Perfect Portfolio is divided into three parts Part I reveals the problems faced by today's investors outlines a new approach for solving them and gets you started by showing how to design the Core Segment or foundation of your Perfect Portfolio Part II details how to supercharge your Perfect Portfolio's returns by adding a Target Market Segment consisting of five newly defined asset classes Part III illustrates how you can bring the Core and Target Market Segments together to form a Perfect Portfolio that meets your unique investing profile and current market conditions This is a book that financial advisers will not want you to read Why Because it takes them out of the loop by empowering you to make informed and profitable investing decisions on your own The Perfect Portfolio places the power to control your wealth firmly in your hands where it belongs The Perfect Portfolio is more than just a book It also includes a supplemental online component you can access via the Web at [www.perfectportfoliobook.com](http://www.perfectportfoliobook.com) The use of this resource is not required to take full advantage of the book's content but the information and tools presented in the online component can enhance your overall learning experience

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