MEISTERPLAN

How UCLA Anderson ACIS Connects People-First Capacity Planning to Reliable Portfolio Delivery with Meisterplan

By combining lean portfolio practices, realistic resource planning, and supportive governance, the UCLA Anderson ACIS IT PMO strengthened its ability to make informed decisions and deliver on its portfolio commitments.

Background

Anderson Computing and Information Services (ACIS) supports the technology needs and strategic initiatives of the UCLA Anderson School of Management. Its IT Project Management Office oversees a diverse portfolio that includes digital transformation, student success systems, infrastructure upgrades, and process innovation.

Mishirika Scott
Associate Director, IT PMO

Mishirika Scott, PfMP®, is the Associate Director, IT PMO and chairs the PMO's Governance Board.

Dave George
IT PMO Business Analyst

Dave George, supports the Board and project managers by coordinating weekly reporting, maintaining portfolio information in Meisterplan, and onboarding new users.

The ACIS team is deeply committed to what it delivers:

"We have a team of people who will walk through walls because we believe deeply in the work we do."

That commitment was a strength, but it also made realistic portfolio planning especially important. No one is assigned exclusively to PMO-tracked projects. Employees contribute to project work alongside maintenance, operations, training, professional development, and other responsibilities.

The Challenge

A Strong Team Needed a More Reliable Portfolio Picture

When Mishirika joined ACIS in August 2021, Meisterplan and a PMO Governance Board were already in place. At that point, the portfolio included 13 active projects, many of which were in the “danger zone.” Static throughput stood at 8% while real-time throughput was 50%.

Those figures provided an important baseline. The challenge was not simply to complete more projects. ACIS needed better governance, resource visibility, accountability, and shared working practices to make realistic commitments and deliver them consistently.

The Solution

A Lean Process That Puts People First

Allocations, milestones, dates, and project updates need to stay up to date. With an accurate portfolio-wide view in Meisterplan, it's easy for ACIS to see which resources are allocated to which projects, how much capacity is already committed, and where conflicts could affect delivery.

Stronger Governance and a Leaner PMO Process

ACIS combined Meisterplan with stronger governance, clearer responsibilities, and leaner ways of working. The existing PMO Governance Board brought together resource supervisors on a regular cadence. Building on that foundation, Mishirika worked to define the responsibilities of the PMO, project managers, portfolio leadership, and board members more clearly. The team documented expectations and established a shared decision-making framework. Dave then helped turn that model into a repeatable operating rhythm.

As the PMO matured further, ACIS developed a streamlined "PMO Light" approach supported by its Project Team Debrief Report, which guides project managers through key points in the project lifecycle. The updated process brings greater consistency to project intake, chartering, resource approval, weekly reporting, change requests, and closeout while making the supporting documentation easier to navigate and maintain.

Meisterplan is embedded throughout the process and has become the source of truth for ACIS's project portfolio.

At intake and chartering, the PMO uses it to maintain current information about strategic alignment, project dates, milestones, and resource allocations. During delivery, project managers update required fields in Meisterplan, including degree of completion, the latest project notes, and the date of the update. They also keep milestones and relevant project dates current, so stakeholder reporting reflects the latest plan.

At closeout, project managers document lessons learned, confirm that the definition of done has been met, and identify responsibility for ongoing operational work. Meisterplan is then updated so the portfolio accurately reflects completed work and newly available capacity. Project managers know what information is expected, while leaders have a consistent basis for reviewing status, understanding changes, and making decisions across the portfolio.

"I didn't want our tools to dictate how we work, but to enhance our processes and reveal areas for improvement."

ACIS also integrated Meisterplan with Microsoft Power BI to report on throughput and track progress toward its fiscal-year performance target. When a project manager submits a change request, the PMO can use the portfolio view to understand how it could affect resources, timelines, and other commitments before making a decision. Together, the process and the portfolio give ACIS a consistent basis for decisions.

Putting People at the Center of Capacity Planning

For ACIS, realistic capacity planning starts by recognizing that people are not available for projects 100% of the time. The CIO and PMO Governance Board approved standard capacity allowances that are represented in Meisterplan:

- 10% for non-work time, including vacation, sickness, and public holidays
- 5% for learning and professional development
- Time for business-as-usual work, maintenance, operations, and post-project responsibilities

After these are considered, employees are generally available for project work between 0% and 45% of the time. This gives the PMO a more realistic picture of the capacity it can commit. It also reflects the belief that portfolio planning should account for the full working lives of employees rather than treating every theoretically available hour as project capacity.

“I often say it’s as simple as putting people over processes,” said Mishirika. “People appreciate being appreciated.”

The approach extends beyond percentage allocations. Resource supervisors confirm availability before a project is presented to the Governance Board. Project managers are expected to account for vacations, campus holidays, academic events, and other known constraints when building timelines.

When a critical resource will be absent, the project manager assesses the schedule impact, informs the project team and executive sponsors, and works with the resource supervisor to identify backup coverage or adjust deliverables. The PMO then updates Meisterplan so the wider portfolio reflects the change.

“The one feature that we could not live without is resource capacity planning.”

During FY24-25, ACIS tracked 8,047.33 hours of work in Meisterplan across 11 projects. Over the course of the portfolio year, the PMO managed 68 resource swaps and transitions through Meisterplan, involving project managers and team members from several functional units.

Frequent changes are part of managing a portfolio built around shared, matrixed resources. Project work must be balanced with operational responsibilities, holidays, professional development, and changing organizational needs.

With current allocation and timeline information in Meisterplan, ACIS could evaluate how a resource change would affect more than one project. The PMO could adjust assignments, timelines, or expectations while keeping the wider portfolio and the people delivering it in view. This supported what Mishirika describes as a "soft-touch" approach to resource management. Capacity decisions could account for delivery needs without losing sight of the people doing the work.

Practical Adoption and Weekly Portfolio Communication

Making Meisterplan the source of truth required more than simply asking employees to use it. ACIS took a supportive approach to adoption. Mishirika led Learn-at-Lunch sessions on Meisterplan and the PMO process, giving employees an opportunity to ask questions and understand how the platform fit into the organization's wider way of working.

She followed those sessions with one-on-one and small-group introductions. Rather than presenting every feature Meisterplan offered, the PMO showed employees how ACIS used it and which parts were relevant to their roles.

Dave now plays an important part in continuing that onboarding process. Every new ACIS employee is added to Meisterplan within their first 30 days and receives a 30-minute, ACIS-specific introduction. The session reviews the employee's access rights and explains how the PMO uses Meisterplan to track and report weekly portfolio status.

"A guided tour of the platform interface as our PMO uses it goes a long way toward making our new colleagues feel more confident."

With the project data entered regularly by employees, Dave can then aggregate updates and report them in a summarized format, so the broader organization remains informed about PMO-tracked work. This way, stakeholders aren't required to search through multiple systems or interpret raw project data. It also helps ensure that leadership decisions and external communication are based on portfolio information from the same source.

The Impact

Turning Limited Capacity into Meaningful Outcomes

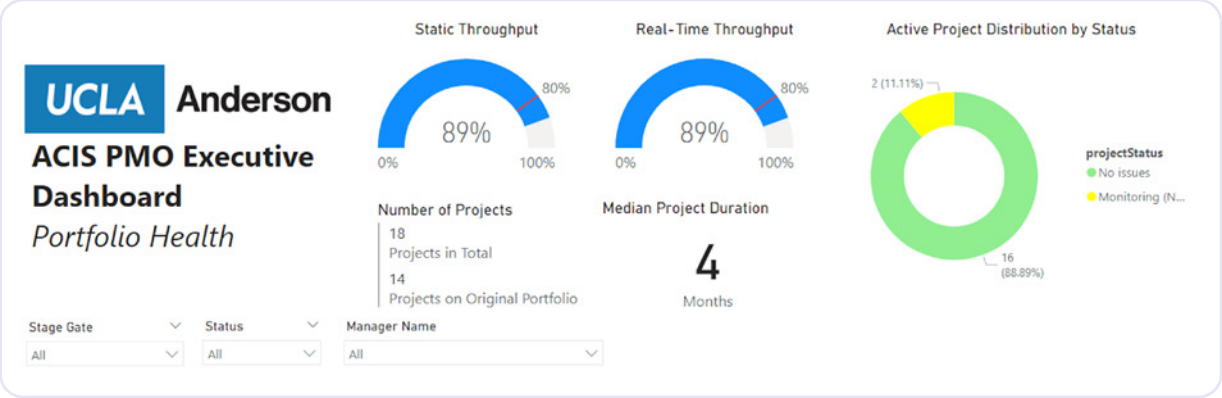
By FY24-25, the changes ACIS had made to governance, capacity planning, reporting, and adoption were visible in its portfolio performance.

From 8% to 89%: Turning Better Portfolio Decisions into More Reliable Delivery

At the fiscal year close on June 30, 2025, ACIS had achieved 89% static and real-time throughput, exceeding the CIO's target of 80%. That represented a substantial improvement from October 2021, when static throughput stood at 8% and real-time throughput at 50%.

This comparison shows the PMO's growing ability to prioritize realistically, account for shared-resource capacity, identify issues earlier, and maintain accountability for the commitments represented in the portfolio.

The median project duration also decreased from five months in 2021 to four months in FY-24-25. In an environment shaped by academic schedules, campus closures, staff absences, and matrixed responsibilities, that reduction provides another indication of the PMO's progress toward more focused and reliable delivery.



Reaching 100% Through Responsible Replanning

The portfolio did not proceed exactly according to its original calendar. Its launch was delayed by approximately one and a half months, and leadership made a deliberate decision to extend the portfolio close, the end of the annual portfolio cycle, by one month.

Using current portfolio information, leadership could recognize that the original date was no longer realistic, understand the implications, and adjust it transparently.

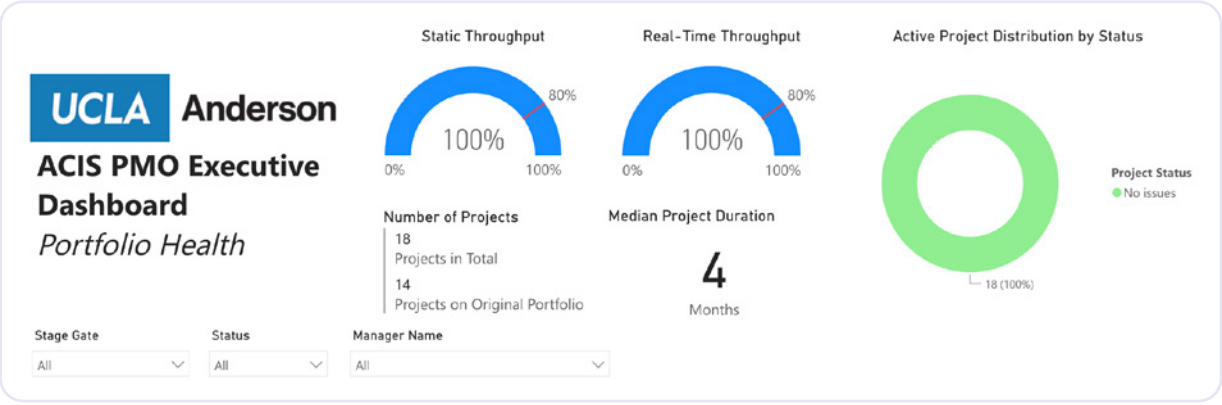
By the revised portfolio close on July 31, ACIS had reached 100% throughput. For the first time in four years, no projects remained open beyond portfolio close. That milestone reflected stronger planning and resource coordination, as well as a more mature approach to accountability. ACIS used portfolio data to revise the plan responsibly and then completed its commitments within that revised window.

Mishirika describes FY24-25 as ACIS's highest-performing portfolio year to date. The team evaluates that performance through the lens of Return on Effort, asking how effectively it turns limited staff capacity into meaningful outcomes for the organization.

These results reflect the combination of Meisterplan's portfolio and capacity insights with several years of work by Mishirika, Dave, the Governance Board, project managers, resource supervisors, executive sponsors, and delivery teams.

Lean portfolio practices, like ACIS's PMO Light, created a more focused process. Clear responsibilities strengthened accountability. Coaching and onboarding helped people participate confidently. Meisterplan connected those efforts through a shared view of projects, resources, timelines, and capacity, giving ACIS the information needed to make better decisions and adapt the portfolio as conditions changed.

Plans still change. The difference is that ACIS can now identify the implications earlier and respond proactively rather than reactively. Meisterplan helps leadership understand changes in context. Rather than treating each resource adjustment as an isolated staffing issue, the PMO can evaluate its effect on milestones, other initiatives, and the portfolio as a whole.



Building Trust Through Portfolio Performance

The stronger delivery results also helped ACIS build trust across the organization. Meisterplan and Power BI provide data for the annual ACIS and PMO "Year in Review," which is shared with the broader UCLA Anderson community. The report recognizes the work completed by project teams and connects it to strategic goals and customer outcomes.

Executive sponsors and the Governance Board receive more actionable information. Project managers and shared resources work within more repeatable processes. Teams have a better understanding of what has been committed and how their contributions fit into the wider portfolio.

The PMO can also demonstrate its role as a strategic partner. Instead of focusing only on whether individual projects are active or complete, it helps the organization determine whether it is doing the right work, whether it has the capacity to deliver it, and how changes could affect other commitments.

"The most visible change is that project managers, teams, and executive leaders now see, year after year, how we deliver on our shared promises through a strategically aligned project portfolio."

The Outlook

Continuing to Improve

ACIS does not view the PMO process as finished. Mishirika and Dave continue to explore ways to make reporting easier for project managers without disrupting processes that already work well. That includes potential automation of weekly status reporting and more structured management of project risk.

Dave is leading work to evaluate how risks can be captured more consistently in weekly project updates and surfaced through Meisterplan. ACIS is particularly interested in configuring risk information to reflect its own environment and, over time, connecting project-level risks to a broader portfolio-risk view.

The team is also continuing to refine PMO Light, gather feedback, and find ways to reduce administrative effort. The goal is to give project managers more time for valuable work while preserving the transparency and accountability the PMO has built. As the organization looks ahead, the principle remains the same: tools should support the way the PMO works and help reveal the next opportunity to improve.

"We Win Together"

Mishirika and Dave's advice to other organizations improving portfolio and resource management is to focus on accountability, transparency, executive commitment, and stakeholder engagement.

Processes should be well defined, but they should remain usable. Adoption should be made easy. Employees should have opportunities to learn, provide feedback, and understand how their contribution supports the portfolio. Most importantly, planning should recognize the people behind the allocations.

At UCLA Anderson ACIS, that philosophy is captured in a motto Mishirika introduced to the team: "We Win Together." It describes the operating model the PMO has built. Leadership, resource supervisors, project managers, and teams share responsibility for making realistic commitments and delivering meaningful outcomes.

Mishirika has helped shape the governance, culture, and strategic direction behind that model. Dave helps make it repeatable through ongoing coordination, reporting, data maintenance, onboarding, and project-manager support.

Meisterplan gives them the portfolio and capacity view needed to support that responsibility. The people and processes at ACIS turn that view into action.

About UCLA Anderson ACIS

The UCLA Anderson School of Management's Anderson Computing and Information Services team supports the school's technology needs and strategic initiatives. Its IT PMO oversees a diverse portfolio that includes digital transformation, student success systems, infrastructure upgrades, process innovation, and other work that supports the broader Anderson community.

Mishirika Scott, PfMP®, is the Associate Director, IT PMO at UCLA Anderson ACIS and chair of the PMO Governance Board. She leads the organization's portfolio governance and supports the development of repeatable processes that connect project delivery with business goals. Her work focuses on strategic alignment, portfolio performance, resource capacity planning, and building a supportive culture of accountability and shared ownership.

Dave George is an IT PMO Business Analyst who has been with ACIS for 21 years and joined the PMO team in 2024. He supports the Governance Board and ACIS project managers, coordinates weekly portfolio reporting, helps maintain Meisterplan as the PMO's source of truth, and provides onboarding and coaching to employees who use the platform.

Howard Miller serves as Chief Information officer (CIO) for ACIS, within the broader administrative portfolio led by Jami Carman, Senior Associate Dean of Administration and Chief Operating Officer (COO). The PMO Governance Board is comprised of dedicated leaders and resource managers from across ACIS who help guide portfolio strategy, governance, and resource management.

Together, they help ACIS connect portfolio-level decision-making with the day-to-day practices needed to plan, communicate, and deliver work across a matrixed organization.

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