

# P3M3® – Portfolio Model



## 3. Portfolio Management Maturity Model

This model was created from information gathered as part of the Cabinet Office and OGC research into the concept of portfolio management.

### Definition of portfolio management

The OGC definition of a portfolio is the totality of an organization's investment (or a segment thereof) in the changes required to achieve its strategic objectives.

Portfolio management describes the management of an organization's portfolio of business change initiatives. It is a coordinated collection of strategic processes and decisions that together enable the most effective balance of organizational change and business as usual. P3M3 views portfolio management as an important and active discipline, critical to the success of achieving effective change in an organization.

Effective portfolio management leads to processes and behaviours that enable successful delivery across an organization's entire change investment, and it ensures that:

- change initiatives address and achieve strategic objectives
- maximum business value is realized and at an early stage
- risks are managed
- the total change investment is coherent, prioritized and scrutinized
- the broad allocation of skilled change resources is optimized
- new initiatives can be evaluated against strategic objectives, business value and current commitments
- demands from change initiatives on the operational business can be managed and coordinated at an organizational level.

Organizations may choose to subdivide their portfolio or manage only a portion of it. This is often done in relation to a financial portfolio, a buildings and accommodation portfolio or an IT-enabled business change portfolio, for example.

### Characteristics of portfolio management

Good portfolio management will be expected to have the following characteristics.

- Focus will be on leadership and alignment with organizational strategy
- Visions and blueprints will cover the entire, defined organization
- Timescales for the portfolio may be vague, flexible and long term
- Risk will be viewed from a strategic perspective and in a business continuity context
- Integrity of the entire business transformation is managed through programmes and projects and business as usual
- Benefits orientation will be towards the organizational benefits that affect all areas and are linked to strategic organizational goals
- Stakeholder engagement will have a strategic and external focus
- Governance requires the setting of policies and standards
- Quality will be viewed from the perspective of portfolio alignment and effectiveness
- Planning will be viewed in the context of outcome dependency and conflict resolution
- A combination of programmes and projects and other business change activity is likely.

The management of internal elements of programmes or projects is not considered part of portfolio management.

### Attributes of portfolio management

The following sections set out the attributes for each of the seven Process Perspectives within the Portfolio Management Maturity Model, at each of the five Maturity Levels, along with a description of each attribute.



**PfM3 - Management Control – Level 1****Description**

The organization recognizes the portfolio but has little or nothing in terms of documented processes or standards for managing the portfolio.

**Specific Attributes**

1. Portfolio concept may be recognized at departmental or divisional level but probably not at organizational level, and likely to be little supporting definition/documentation
2. May be some management attention to portfolio, but no recognizable process for defining and translating the organization's strategic objectives and policies into defined initiatives
3. Portfolio management terminology may be used but not consistently

**Generic Attributes**

1. Training provision is uncoordinated, with little or no knowledge sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic
4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

**PfM3 - Management Control – Level 2****Description**

There are pockets of portfolio discipline within individual departments, but this is based on key individuals rather than as part of a comprehensive and consistent organization-wide approach.

**Specific Attributes**

1. Willingness for the organization to implement new processes to support and enable portfolio management but not implemented consistently
2. Some recognition that departmental or divisional portfolios must fit within the priorities and processes of an organizational portfolio
3. Common vocabulary for portfolio management beginning to evolve
4. May be specific guidelines on portfolio management in parts of the organization

**Generic Attributes**

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record
8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

**PfM3 - Management Control – Level 3****Description**

Portfolio management processes are centrally defined, documented and understood, as are roles and responsibilities for delivery.

**Specific Attributes**

1. Portfolio management recognized as being Executive Board's responsibility and a structure is in place to ensure delivery of portfolio
2. Centrally defined, owned and managed process for translating policy and strategic priorities into portfolio initiatives, with redundant initiatives eliminated
3. Portfolio management processes have specified owners and there is evidence of an effective Organization Portfolio Office
4. Overarching plan linking organizational strategic plan to portfolio initiative plans
5. Portfolio has set policies, standards and methods on how initiatives will be delivered consistently and optimally

6. Organization Portfolio Office reports to Executive Board
7. Documentation explaining context, purpose and expectations of portfolio
8. Portfolio has a defined perimeter, enabling demarcation and understanding of what it contains

**Generic Attributes**

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization’s approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments

3. High-level reports on key aspects of portfolio made available to Executive Board to support informed decision-making
4. Process in place for evaluating and handling major changes within portfolio
5. Continual assessment of organization’s capacity to manage initiatives, and of appropriate prioritization
6. High levels of operational engagement with decision-making and direction of portfolio
7. Decision-making based on maintaining alignment and balance within portfolio, and its optimal configuration, to achieve strategic objectives
8. Initiative management process capability determined and used to establish suitable performance goals, which are then monitored
9. Trend reporting on progress, actual and projected cost, level of risk, and initiative and stakeholder confidence, are routinely collected, reviewed by Executive Board and used for decision-making
10. Quantitative and qualitative measures and lessons identified are routinely used to improve effectiveness of portfolio management

**Generic Attributes**

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

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**PfM3 - Management Control – Level 4 Description**

Portfolio management processes exist and are proven. Portfolio management has established metrics against which the strategic success of the organization can be measured.

**Specific Attributes**

1. Robust organizational framework for categorizing initiatives, measuring and monitoring organizational performance, and measuring contribution from portfolio
2. Executive Board responsible for ensuring delivery of portfolio

**PfM3 - Management Control – Level 5****Description**

Portfolio management has well-defined controls and behaviours that enable it to deliver the strategic objectives of the organization through a variety of processes and tools. There is evidence of continual improvement.

**Specific Attributes**

1. Portfolio management processes proven and optimized
2. Management control and reporting mechanisms are proactive and focus on Key Performance Indicators aligned to the organization's strategic objectives
3. Portfolio management can demonstrate that its role in scrutinizing initiatives has resulted in some being stopped or reshaped to gain better alignment with other initiatives and to optimize delivery
4. Evidence that lessons learned through portfolio management are disseminated widely
5. Management controls evaluated to ensure they remain aligned to business needs
6. Business opportunities identified and potential benefit of new technology to deliver successful outcomes, and its impact, is determined

**Generic Attributes**

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

**PfM3 - Benefits Management – Level 1****Description**

There is some recognition that initiatives may exist within the organizational and divisional portfolio to enable the achievement of benefits for the organization. However, there is no defined benefits realization process.

**Specific Attributes**

1. Initiatives may identify some business benefit generally
2. Any benefits identified tend to be subjective rather than objective
3. May be some statements on the purpose of some initiatives but not providing a clear view of what success will look like

**Generic Attributes**

1. Training provision is uncoordinated, with little or no knowledge sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic
4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

**PfM3 - Benefits Management – Level 2****Description**

The development of the investment cycle will increase the awareness of the importance of identifying benefits and subsequently tracking whether they have been realized. However, the realization of benefits is still likely to be patchy, inconsistent and unmonitored.

**Specified Attributes**

1. Evidence of individuals or local functions using a process for defining business benefits, but little formal benefits tracking, management or ownership
2. Some initiatives will be expected to identify benefits and how to achieve them, but this is deployed inconsistently
3. Likely to be overlap and double counting of benefits between initiatives, with a poorly defined process to identify these

4. Some alignment of identified benefits to the organizational objectives, but likely to be unquantified and patchy

**Generic Attributes**

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record
8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

5. Benefits are owned and the performance management process ensures their realization; ownership may be cascaded but with a clear trail of accountability for benefits realization
6. Strategic benefits fully documented with clear links between initiatives and business change activities
7. Changes to individual initiatives are assessed for impact on benefits realization
8. Defined process for identifying and realizing opportunities
9. Process in place for validating the realization of benefits and refining targets
10. Benefits realization objectives linked to operational business plans

**Generic Attributes**

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization's approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments

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**PfM3 - Benefits Management – Level 3 Description**

There is a centrally managed framework used for defining and tracking the realization of portfolio-level benefits across the business operations.

**Specific Attributes**

1. Explicit statements on how benefits enabled by initiatives actually contribute to business value and strategic objectives
2. Clear organizational policies relating to benefits management deployed through initiatives (e.g. programme benefits management strategies)
3. Business or service areas actively engaged in defining and realizing benefits
4. May be an organizational design authority with responsibility for benefits across portfolio

**PfM3 - Benefits Management – Level 4****Description**

The benefits realization and management process is well established, measurable and is integrated into how the organization manages itself.

**Specific Attributes**

1. Benefits realization and management process well established across all initiatives, with outputs and benefits actively measured, managed and owned, and an identified link between outcomes and the organizational performance framework
2. Clear accountability for benefits realization is defined within portfolio roles
3. There is a portfolio of strategic benefits that the portfolio manages through prioritization of initiatives
4. Dependencies between benefits identified and managed
5. Business areas performance-managed to deliver benefits
6. Performance metrics tracked across the business to measure improvements against baselines and targets
7. Lessons from benefits realization performance embedded into expectations from initiatives
8. Benefits realization integrated into organizational performance management framework
9. Benefits measurement tracks positive and negative effects on the business against a range of operational measures

**Generic Attributes**

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement

7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

**PfM3 - Benefits Management – Level 5****Description**

Benefits realization is integral to the development of business strategy decision-making. There is evidence of continual improvement.

**Specific Attributes**

1. Benefits realization and management process exists and is embedded across the organization, with benefits realization explicitly aligned to organizational performance framework and outcomes
2. Measurement of benefits realized informs the organization's strategic objectives and priorities, enabling adjustments to strategy where necessary
3. Benefits realization and management process is continually improved based on lessons learned and process metrics
4. Externally imposed organizational delivery targets integrated into benefits realization and management process

**Generic Attributes**

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

### PfM3 - Financial Management – Level 1

#### Description

Portfolio oversight of the financial aspects of initiatives may be recognized but there is little or no organizational investment control.

#### Specific Attributes

1. Investment requests often included within general budget rounds and not appraised as investment opportunities against defined selection criteria
2. Funding approval for initiatives devolved to budget centres, with little or no accountability outside of budget holder
3. Some local financial control processes but often failing to understand projected financial outcomes and resolve troubled initiatives

#### Generic Attributes

1. Training provision is uncoordinated, with little or no knowledge sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic
4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

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### PfM3 - Financial Management – Level 2

#### Description

There are business cases being produced and some, usually departmental, structures to oversee investment decisions. However, business cases are often appraised independently of each other and real organizational priorities have not been established.

#### Specific Attributes

1. Some business cases for some initiatives tested against emerging organizational priorities and for organizational capacity and appetite for risk
2. Business cases for some initiatives based on simple cost-benefit analysis
3. May be some evidence of options appraisal
4. Provision of funding is local, and not through a consistent and centrally managed process
5. Individual departments establishing structures to oversee and coordinate their initiatives, but little

evidence of initiatives being stopped due to poor performance

6. Application of business case guidance varies and is limited, and business case writing skills are rudimentary
7. Focus on cost tracking rather than financial management
8. Business case production, procurement appraisal and investment control are restricted by the extent of individual competencies

#### Generic Attributes

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record
8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

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### PfM3 - Financial Management – Level 3

#### Description

There are established standards for the investment management process and the preparation of business cases. Portfolio investment costs are monitored and controlled.

#### Specific Attributes

1. Clear, documented and published investment life cycle addressing new ideas, feasibility studies, trials, development and review



2. Investment management process and practice in place across organizational portfolio, within which departmental or specialist portfolios fit
3. Common investment management process and practice within portfolio for initiative approval, monitoring and delegation
4. Business and portfolio planning cycles work concurrently
5. Costs, expenditure and forecasts monitored at portfolio level in accordance with organizational guidelines and procedures
6. Defined interfaces with other financial functions within the organization
7. Criteria within portfolio for organizational investment decision-making are clear and communicated
8. Portfolio management process includes effective planning of funding availability
9. Financial data in management reports integrated with schedule data and including trends
10. Financial modelling of value for money, using agreed and explicit techniques

#### Generic Attributes

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization's approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance

12. Centrally managed role definitions and sets of competencies defined and used to support appointments

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#### PfM3 - Financial Management – Level 4 Description

The organization has effective and robust financial control of its investment decisions and the approval and monitoring of initiatives. There is proactive, evidence-based management of the portfolio investment funds and costs.

#### Specific Attributes

1. Funding for next stage of delivery released only if initiative meets agreed performance criteria
2. Formal review process ensuring that each initiative's actual financial performance and benefits are in line with expectations, with corrective actions taken when required
3. Executive Board reassures itself that there is financial control across portfolio
4. Investment management process fully integrated with performance management framework
5. Investment decisions ensure that initiatives are not started unless their contribution to the organizational objectives and priorities is explicit and aligned
6. External financial risks monitored and evaluated as part of investment management processes
7. Analysis prior to investment decisions made through senior management-owned Investment Board or other delegated expert body
8. Accurate financial management information on initiative costs and benefits is available, to facilitate proactive management of the organization's total investment
9. Full integration between organizational and portfolio financial planning cycles
10. Financial oversight of portfolio is organization-centric rather than programme- or project-centric

#### Generic Attributes

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning

4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

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### **PfM3 - Financial Management – Level 5 Description**

Financial control of the portfolio is an integral part of the organization's financial control regime. There is evidence of continual improvement.

#### **Specific Attributes**

1. Executive Board manages investments by funding only those initiatives with valid business cases and which continue to pass formal reviews
2. Investment decisions consider the organization's entire portfolio of initiatives and collective benefits and priorities
3. There is a portfolio of initiatives that balances financial risk
4. Portfolio financial decision-making is based on actual and forecast data from its initiatives
5. The organization is able to flex its appetite for financial risk to better align portfolio to meet organizational objectives
6. Appropriate financial control embedded within initiatives and integrated with organizational financial control

#### **Generic Attributes**

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed

5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

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### **PfM3 - Stakeholder Engagement – Level 1 Description**

Stakeholder engagement and communication is rarely used by portfolios as an element of the delivery toolkit.

#### **Specific Attributes**

1. Concept of stakeholder engagement may be acknowledged but is undefined
2. Portfolio communicates with stakeholders on ad hoc basis, relying on individuals within the team taking the initiative
3. No structured approach to stakeholder management and communications

#### **Generic Attributes**

1. Training provision is uncoordinated, with little or no knowledge-sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic
4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

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### **PfM3 - Stakeholder Engagement – Level 2 Description**

Portfolios will be communicated to stakeholders, but this is linked more to the personal initiative of portfolio managers than to a structured approach deployed by the organization.

**Specific Attributes**

1. Evidence may exist of more sophisticated analysis and communications planning for some portfolios
2. Most stakeholder analysis is basic and inconsistent, limited to the issue of what stakeholders are interested in
3. Portfolios recognize stakeholder groupings but are limited to local knowledge
4. Some portfolios have their own communications plans but they focus on merely transmitting information
5. Outgoing communications channels from portfolios are limited, with focus on email or websites
6. Some stakeholders advised or consulted, and feedback processed
7. Structured approach beginning to evolve, but based on good practice of one or two key individuals

**Generic Attributes**

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record
8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

**PfM3 - Stakeholder Engagement – Level 3****Description**

There is a centrally managed and consistent approach to stakeholder engagement and communications used on the portfolio(s).

**Specific Attributes**

1. Centrally defined and consistent approach, and supporting process, for identifying and analyzing stakeholders
2. Portfolios consider stakeholder needs and stakeholders are actively involved in decision-making
3. Corporate communications (or equivalent) are involved in development of stakeholder engagement processes and procedures
4. Stakeholders have authority and clearly defined roles within portfolios
5. Audit trails of communications maintained for all portfolios
6. Communications channels vary and are used to target and deliver messages effectively
7. Communications budget exists
8. Much of this approach is provided by the Organization Portfolio Office

**Generic Attributes**

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization's approaches and raising competence of individuals in specific roles

11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments

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#### **PfM3 - Stakeholder Engagement – Level 4 Description**

Sophisticated techniques are used to analyze and engage the portfolio stakeholder environment effectively, and quantitative information is used to underpin the assessment of effectiveness.

##### **Specific Attributes**

1. Sophisticated approach to analyzing, segmenting and maintaining stakeholder perspective information
2. Extensive range of communications channels and techniques used to deliver messages
3. Effectiveness of communications and stakeholder engagement is measured, and is high
4. Critical stakeholders embedded in decision-making process
5. Stakeholder reactions analyzed, and evidence of proactive communications management to influence stakeholder attitudes and levels of support
6. Programme leaders engaged with and supporting communications activities
7. Stakeholder identification and analysis covers internal and external groups, with information maintained centrally
8. Portfolios with high levels of market or community consultation are commonly at this level

##### **Generic Attributes**

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance

5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

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#### **PfM3 - Stakeholder Engagement – Level 5 Description**

Communications are being optimized from extensive knowledge of the stakeholder environment, to enable the portfolio(s) to achieve their objectives. There is evidence of continual improvement.

##### **Specific Attributes**

1. Stakeholder engagement embedded in the organization's culture
2. Communications active, bi-directional and embedded in decision-making process
3. Stakeholders fully engaged in change process at all levels
4. Communications recognized by Executive Board as a key leadership tool
5. Communications measured, relevant and trusted

##### **Generic Attributes**

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization



- Skills embedded into organizational leadership and management development programmes

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### PfM3 - Risk Management – Level 1

#### Description

There is a growing recognition that risks need to be managed and that, at least for key business initiatives (e.g. cost saving or major site developments), they can threaten success.

There may be evidence of risks being documented but little evidence of active management.

#### Specific Attributes

- Risk analysis may be conducted early in initiatives but is not maintained as a continual management process
- May be an inventory of organizational risks, but they may not be assessed for impact on schedule, cost and quality
- Decision-making on risks tends to be initiative-focused, considering impact on an individual initiative's outputs rather than the wider impact
- May be some identification of risk (probably in different systems, such as spreadsheets, text documents, databases, etc.) and some quantification, but little actual management

#### Generic Attributes

- Training provision is uncoordinated, with little or no knowledge sharing
- Key individuals lack experience
- No standard roles, and responsibilities are not defined or are generic
- Some information available but is outdated, unstructured and dispersed
- Limited, if any, formal checking or review
- Plans, if any, are conceptual or merely sequences of events with rough timescales
- Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

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### PfM3 - Risk Management – Level 2

#### Description

There is generally a top-down approach to risk identification, focusing on major organizational initiatives, but some initiatives are increasingly carrying out bottom-up risk identification. However, these approaches are inconsistent, not particularly interrelated and often do not address the actual management of risks.

#### Specific Attributes

- Some initiatives manage risks, but risk decision-making may not consider wider outcome, focusing on threats to initiative rather than to portfolio as a whole and the realization of strategic objectives
- Some initiatives analyze risk in terms of probability, impact (on schedule, cost and quality of deliverables) and timing
- Some proactive management of risk, with mitigation plans in place, but such plans are rare and probably unfunded
- Focus on risk tracking rather than risk management
- No escalation procedures for risk mitigation to pass to more senior management
- May be some effective ownership of risks and risk actions
- Top-down (sometimes "knee-jerk") approach to risk identification unconnected with bottom-up approach within initiatives, often causing duplication of effort, competing teams, non-optimal resource allocation, and consequently ineffective management of organizational risk

#### Generic Attributes

- Localized information structures, with some information sharing between teams
- Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
- Limited localized information controls, with no formal release management arrangements
- Local reviews, with some corrective actions undertaken within the group
- Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
- Local sharing of knowledge may exist but mostly ad hoc
- Key individuals may have practical delivery experience and track record
- Roles, responsibilities and competencies defined in some areas but not consistently across the organization
- Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally

10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more “guesstimation” and does not use standard techniques

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### PfM3 - Risk Management – Level 3

#### Description

Portfolio risks are identified and quantified, and response plans are developed and funded. Risk management across the portfolio(s) is based on a common, centrally managed process.

#### Specific Attributes

1. Portfolio management has defined a risk management process and a risk management policy
2. All initiatives comply with portfolio risk management process and risk management policy
3. Portfolio processes aggregate risks and external factors are identified and managed centrally (e.g. delivery chain and likely demands/impacts on operational business)
4. Portfolio risk management integrated with organizational risk management approach
5. Efforts to manage risks are appropriate to their significance and priority
6. There is a risk manager or individual with responsibility and time for the management of risks within portfolio
7. Risks are owned and actively managed by nominated individuals
8. Robust risk management includes: identification of strategic, delivery (programme/project) and operational threats/opportunities; consistent analysis of risk in terms of probability, impact (on schedule, cost and quality of deliverables) and proximity (timing); response plan production and funding; and continual review by knowledgeable experts, risk owners and senior managers

#### Generic Attributes

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place

5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization’s approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments

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### PfM3 - Risk Management – Level 4

#### Description

The organization’s appetite for risk, and the balance of threats and opportunities across the portfolio, are continually reviewed and managed. Senior management owns and oversees risk management across the portfolio.

#### Specific Attributes

1. Portfolio risk management embedded within organizational reporting, governance and management structures
2. Portfolio risks periodically re-assessed by Executive Board to ascertain threats to, and opportunities for, achieving organizational objectives
3. Focus of risk management is on aggregation and balance of risk across portfolio’s initiatives
4. Executive Board oversees major threats and opportunities, and their response management, and takes accountability for the management of risk
5. Portfolio management identifies common risks across whole portfolio (which may not be visible to individual initiatives) and balances the organization’s overall exposure to risk
6. Decision-making based on outputs of techniques for assessing risks, including risk modelling and simulations

7. Risk analysis conducted from a number of perspectives, including strategic, operational, commercial and internal to the initiative
8. Appropriate reference to risk specialists and others where appropriate (e.g. business continuity, security, incident management, health and safety, environment, procurement)
9. Clear accountability and ownership of risks and evidence of appropriate actions being taken

#### Generic Attributes

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

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### PfM3 - Risk Management – Level 5

#### Description

Risk management is embedded in the culture of the organization and underpins all decision-making within the portfolio(s).

There is evidence of continual improvement.

#### Specific Attributes

1. Effective organizational risk management framework with which portfolio interacts effectively
2. Formal portfolio gate reviews used to proactively assess and manage investment risk and make decisions based on their impact on portfolio
3. Organizational risk management process and outcomes continually reviewed to ensure effectiveness of the process and the organizational risk management framework

4. Adequate resources and funding provided for risk management improvement activities
5. Risk management illustrates a proven and balanced approach to opportunities and threats across portfolio
6. Risk management underpins decision-making process throughout portfolio

#### Generic Attributes

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

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### PfM3 - Organizational Governance – Level 1

#### Description

The organization has some inconsistent and informal attempts to align individual initiatives to organizational objectives, and there is an ad hoc, inconsistent and ineffective oversight of initiatives.

#### Specific Attributes

1. May be a recognition that initiatives fit within an organizational portfolio, but at best this link will be notional
2. Initiatives may have been defined but there is only notional alignment with organizational objectives and priorities

#### Generic Attributes

1. Training provision is uncoordinated, with little or no knowledge sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic

4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

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**PfM3 - Organizational Governance – Level 2 Description**

There are some attempts to recognize the portfolio of initiatives, but there is still little overall leadership and direction for the process.

Initiatives may be initiated and run without full regard to the organizational goals, priorities and targets.

**Specific Attributes**

1. May be local governance developed for specialist or departmental portfolios but inconsistent across the organization
2. Some key organizational priorities established but wider strategic objectives and priorities for portfolio are unclear and not communicated
3. Initiatives focused on achieving tactical or localized objectives rather than strategic objectives
4. Some areas undertaking process improvement
5. Difficult to establish rationale on which initiatives are funded or approved

**Generic Attributes**

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record

8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

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**PfM3 - Organizational Governance – Level 3 Description**

Centrally defined organizational controls are applied consistently to the portfolio(s), with decision-making structures in place and linked to organizational governance.

**Specific Attributes**

1. The organization has established documented policies, standards, processes and governance for change investments, and has developed an Executive Board-owned structure to oversee portfolio performance
2. Clear, defined vision for organizational change, with senior management demonstrating commitment to it
3. Portfolio is well defined and aligned with strategic objectives and priorities
4. Clear governance structure ensuring that all initiatives are evaluated, prioritized and approved based on strategic objectives, and business cases are continually reviewed for validity and viability
5. Organization Portfolio Office monitors effectiveness of governance and stakeholder engagement for all initiatives
6. Legislative and regulatory requirements incorporated into portfolio management decision and controls processes
7. Governance controls integrated into portfolio controls
8. Business performance information acquired and reviewed by Organization Portfolio Office
9. Process ownership is clear and related decision-making responsibilities are clearly defined

**Generic Attributes**

1. Information has a refresh cycle or is regularly accessed



2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based
7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization's approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments
5. All initiatives analyzed to identify common causes of failure, high risk, high cost, etc., so that lessons identified can be applied to refining processes, improving performance and saving cost and time
6. Portfolio governance decision-making process is auditable and clear
7. Active searching for improvement in how portfolio integrates with organizational governance
8. Clear auditable relationship between strategic objectives and portfolio activities
9. Organizational and portfolio leadership are aligned
10. Analysis and modelling of impact of change on sustainability of business performance during transition
11. Business processes modelled and actively managed using a structured approach
12. Executive Board accountable for decisions to "stop or go" with change transitions
13. Senior management ascertain the extent of improvement to assets

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#### **PfM3 - Organizational Governance – Level 4 Description**

All initiatives are integrated into an achievable and governed portfolio, which is aligned to strategic objectives and priorities. The portfolio contains relevant information on initiatives (e.g. performance measures, quality attributes and asset management data) to support Executive Board decisions.

##### **Specific Attributes**

1. Executive Board shows longevity of commitment to value of portfolio management and views portfolio as strategic vehicle for change
2. Portfolio formally reviewed periodically (at least annually) to test for continued relevance of portfolio as a whole and initiatives within it
3. Executive Board intervenes to ensure that portfolio remains aligned to organization's objectives
4. Within portfolio governance arrangements each initiative is tested and prioritized for achievability, impact on strategic objectives and relative benefits
1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

### PfM3 - Organizational Governance – Level 5 Description

The portfolio is managed to ensure that it remains aligned to support the organization’s strategic objectives. The portfolio management process is optimized to ensure that it is sufficiently dynamic and agile to cater for changes in business direction and priorities.

There is evidence of continual improvement.

#### Specific Attributes

1. Governance of investment management has moved from a programme/project-centric process to organization-centric
2. Portfolio realigned to meet changing circumstances, priorities, drivers and funding, with resources re-allocated accordingly
3. The organization has effective and robust governance for managing change
4. Prioritization within portfolio based on priority of strategic objectives
5. Executive Board has clear accountability for stability of the organization and actively manages portfolio to ensure sustainability and realization of strategic objectives
6. Organization proactively enables, supports and achieves business process improvement
7. Quantitatively measurable goals for process improvement, with performance against them tracked
8. Business performance management is effective and seamlessly incorporates process improvements and benefits enabled by initiatives

#### Generic Attributes

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery

7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

### PfM3 - Resource Management – Level 1 Description

Portfolio resource requirements are recognized but not systematically managed. Resource allocation is ad hoc, with little, if any, profiling of resources to meet the resource requirements of specific initiatives.

#### Specific Attributes

1. Individual initiatives identify and source their own resources, creating a high risk of the organization over-committing key resources
2. Little or no coordination of resources across different initiatives, and limited alignment to organizational objectives and priorities, leading to resource conflicts
3. Resource acquisition is ad hoc and uncoordinated

#### Generic Attributes

1. Training provision is uncoordinated, with little or no knowledge sharing
2. Key individuals lack experience
3. No standard roles, and responsibilities are not defined or are generic
4. Some information available but is outdated, unstructured and dispersed
5. Limited, if any, formal checking or review
6. Plans, if any, are conceptual or merely sequences of events with rough timescales
7. Planning, if any, likely to be an initial activity with little maintenance of ownership or tracking

### PfM3 - Resource Management – Level 2 Description

The organization has started to develop portfolio resource management processes and improve the identification and allocation of resources to specific initiatives. However, this is likely to be reliant on key individuals and does not assess the impact of resource allocation against the strategic objectives and priorities.

**Specific Attributes**

1. Resources deployed within specialist or departmental portfolios, with limited consideration of the wider organizational portfolio
2. Some specialist or departmental portfolios have defined methods of resource acquisition but these are likely to differ and be applied inconsistently
3. Limited assessment of impact on other initiatives or operational areas when allocating resources
4. Pockets of good resource management processes but likely to be limited to specific initiatives or departments
5. Problems of not managing resources across portfolio are beginning to be understood and solutions starting to be developed in isolated initiatives or departments

**Generic Attributes**

1. Localized information structures, with some information sharing between teams
2. Focus on documentation during start-up and definition, but not maintained over initiative's life cycle
3. Limited localized information controls, with no formal release management arrangements
4. Local reviews, with some corrective actions undertaken within the group
5. Generic training may be provided in key concepts, and there may be individuals undertaking qualification training
6. Local sharing of knowledge may exist but mostly ad hoc
7. Key individuals may have practical delivery experience and track record
8. Roles, responsibilities and competencies defined in some areas but not consistently across the organization
9. Plans exist but are not underpinned by consistent development methodology, yet may still be effective locally
10. Planning seen as activity tracking rather than proactive/forecasting
11. Estimation is more "guesstimation" and does not use standard techniques

**PfM3 - Resource Management – Level 3****Description**

The portfolio resource management process is centrally defined within the organization. Initiative resource needs are evaluated, enabling the organization to target and increase the development of resources to meet strategic objectives and priorities.

**Specific Attributes**

1. Policies, processes and tools in place describing how portfolio resources are acquired, managed, deployed and accounted for, and enabling their acquisition
2. The organization identifies and builds the required capability of its resources and the realistic capacity needed to support its initiatives
3. The organization has a portfolio resource pool used by initiatives to identify staff (including from the operational business) with the appropriate skill sets
4. Portfolio resource management process builds on that within initiatives by ensuring that resource allocation takes cognizance of strategic objectives and priorities
5. Organization Portfolio Office tracks portfolio resource utilization
6. Mechanisms in place for acquisition of portfolio resources and exploitation of supply chain opportunities
7. Consistent approach to procurement of resources within portfolio
8. Supply chain recognized as part of resource pool
9. Career path for portfolio staff defined, clear and implemented

**Generic Attributes**

1. Information has a refresh cycle or is regularly accessed
2. Organization-wide information standards on confidentiality, availability and integrity
3. Formal information release management procedures
4. Independent reviews take place
5. Scrutiny largely for compliance reasons, identifying failures rather than opportunities for improvement
6. Plans developed to a central and consistent standard that is output- or goal-based

7. Plan development takes into account a range of relevant factors
8. Evidence of effective estimating techniques
9. Dependencies are identified, tracked and managed effectively
10. Training is focused on the organization's approaches and raising competence of individuals in specific roles
11. Forums exist for sharing organizational experience to improve individual and organizational performance
12. Centrally managed role definitions and sets of competencies defined and used to support appointments

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**PfM3 - Resource Management – Level 4 Description**

The organization has established effective capacity and capability strategies and processes for obtaining, allocating and adjusting resource levels (including people, funding, estate and tools) in line with medium- and long-term investment plans.

**Specific Attributes**

1. Practices and processes of the organization support portfolio management and the acquisition, allocation and efficient management of resources across departmental and functional boundaries
2. Utilization of the organization's resource pool monitored in order to plan, manage and meet its resourcing needs across all initiatives
3. Priority of initiatives within portfolio informs decisions on resource allocation
4. Portfolio resource management integrates operational and portfolio resource needs
5. Return to business as usual arrangements for staff seconded to programmes and/or projects are implemented and effective
6. Potential resource conflicts across initiatives resolved on the basis of strategic priorities, levels of risk and extent of benefits to be realized
7. Performance assessment of resources based on initiative delivery rather than individual or team performance
8. Continual engagement with supply chain to optimize deployment of internal and external resources

**Generic Attributes**

1. Information is current and extensively referenced for better decision-making
2. Trend analysis and measurement undertaken on performance information to identify improvement opportunities
3. Knowledge management is a central function and is used to help improve performance and planning
4. Reviews focus on opportunities to improve as well as compliance
5. Plans kept up to date, with the application of sophisticated planning techniques and recognition of interdependencies
6. Extensive training is provided, focusing on personal development and performance improvement
7. Evidence of interventions to avoid conflicts and take advantage of opportunities
8. Mentoring and individual development is used to improve organizational performance
9. Succession plans exist for key roles

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**PfM3 - Resource Management – Level 5 Description**

Portfolio management drives the planning, development and allocation of initiatives to optimize the effective use of resources in achieving the strategic objectives and priorities. There is an organization-wide resource management policy and strategy for the use of internal and external resources.

There is evidence of continual improvement.

**Specific Attributes**

1. Impact of portfolio on strategic planning and its implementation on future resource capacity demands and capability requirements are understood and managed
2. Optimal usage of organizational resources can be demonstrated
3. Portfolio resource management processes continually improved based on lessons learned and key performance measures
4. Resource allocation to and from initiatives intimately aligned with achieving strategic objectives and priorities
5. Performance metrics evident to assess resource contribution to organizational performance framework (or scorecard)



**Generic Attributes**

1. Information is valued, with continual maintenance and reference
2. Evidence of extensive intelligence-gathering processes, with information disseminated through a variety of channels
3. Review and improvement is continual and proactive, with lessons being shared openly
4. Planning inherent in decision-making process, with adjustments and implications managed and deployed
5. Active management of interdependencies between initiative plans and other business plans
6. Estimations are accurate and used effectively to ensure delivery
7. High levels of competence embedded in all roles and seen as part of career paths
8. Knowledge transfer is an inherent behaviour within the organization
9. Skills embedded into organizational leadership and management development programmes

Feedback concerning the model should be sent to  
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Feedback concerning the self-assessment should be sent to  
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