

| First name: | Surname: | What is your membership level? | Brief overview of your background and experience as a Portfolio professional: (maximum 150 words)   | What motivated you to put yourself forward for election to the APM Portfolio Management SIG committee? (maximum 150 words)  | What qualities, skills and experience do you think you'll bring to the APM Portfolio Management SIG committee? (maximum 150 words)   | How much time do you anticipate being able to spend on SIG activities in an average week? |
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| Petula      | Allison  | Associate                      | I have over 20 years' experience of Change, Portfolio and Project management with the first 10 years in major transformation Programmes in the Public Sector (primarily DWP) and more recently in the financial services sector. The roles and experience I have had range from PMO Finance, Governance and Assurance, Programme Manager to Portfolio Manager. I'm currently the Change and Portfolio Planning Manager for the YBS Group and its investment Programme helping the Group achieve its strategic | I was motivated to apply to the Portfolio Management SIG for three main reasons; I've experienced and used APM in the work environment and seen the value it can bring, I have a genuine interest in how it can grow and develop in line with the current thinking - so would like to contribute and be part of that with other experts and also to increase my own understanding and personal development in this area/discipline. The environment and way we work and manage is constantly evolving and I'd like to be part of helping shape and evolve the practice. I've enjoyed the past year in this SIG, I've been an active member attending Joint Liaison meetings, presenting at Thought Leadership events, Portfolio | I have over 20 years experience at all levels of Project and Portfolio management in both the Public and Private sector. I have many learnings and best practice from my experiences in Project Management, major Programmes, traditional PMO's and enterprise PMO's. I'm a Practitioner in Prince, Change and Benefits Management. My personal skills are; stakeholder management, organisation, planning, quality control, understanding big picture. My personal values and qualities are; honesty, patience, tenacity, reliability | 5 Hours   |

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|       |        |      | goals and outcomes for customers and colleagues by investing c.£300m over 5 years.   | Directors Agile event, the Conference, review of the BOK and would like to contribute further.  |   |  |
| Tanya | Durlen | Full | Many years experience in developing and implementing portfolio management at enterprise level - as a Head of Portfolio and Benefits Management at TfL; and more recently as a Portfolio Design Authority at Sellafield.  | I have been an active member of the PfM SIG in the past year, acting in a SIG liaison role. In this role I have organised joint workshops with the Governance SIG and have set up a working group with the Change SIG which is meeting regularly looking at the issues of shared interest. I am passionate about portfolio management and would like to continue being part of the SIG committee. | Many years experience of taking portfolio management to strategic level and track record of developing profession for the benefit of greater good; and many years contributing to APM.  | Couple of hours a week   |
| Osian | Evans  | Full | I am a P3M professional who is part of the P-cubed UK leadership team, specialising in delivering complex business change initiatives (project, programme and portfolio level) across the public and private sectors. I am currently working as a portfolio manager in central government. Before this I worked with Network Rail, and NATS in portfolio | I have been volunteering for the PMO SIG committee and with my current and recent experience of working in portfolio management roles I feel it more suitable to transition into the portfolio specific SIG.  | I am a strong believer in giving something back to the industry I work in – having been on the National Executive Committee for Young Rail Professionals (a professional organisation established to promote, inspire and develop the next generation of railway talent) for a number of years, I would like to focus my volunteering efforts in this prestigious space of thought leadership. More recently I have been volunteering with the PMO SIG but I now feel that the Portfolio SIG is more focussed on my | I anticipate circa 2 hours a week and can organise/attended/host events as and when necessary. |

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|      |          |      | <p>management advisory roles. Prior to this I have worked in Project and Programme level roles with London Underground, Paris 2024 Olympics and the DfT. I am a guest lecturer for Warwick University's PPM Master's Degree. I am MoP and MSP practitioner certified.</p> |                                       | <p>current part of my career in terms of where I can best contribute to the APM. I believe I can draw upon my industry expertise, my experience on the YRP National Executive Committee, the PMO SIG and my established network of contacts to bring my collaborative qualities, a can-do attitude and level of energy to your committee. Some specific elements which I believe will help me: - I organised and delivered the YRP Annual Black Tie Dinner for 600 people + keynote speakers in London - I have a strong record of being able to organise YRP seminars and events drawing upon my network of industry leaders and utilising limited resource (e.g. sourcing free venues) - I can utilise my global network of Pcube Portfolio Mgt practitioners to share ideas and thoughts and draw upon the company's 'reachback'. - I will bring a level of enthusiasm and energy to the committee - help take the SIG to the next level in terms of nurturing industry collaboration, publishing thought leadership</p> |                  |
| Mike | Florence | Full | <p>Over 30 years in P3m across bulk chemicals, supply chain, Pharma R&amp;D and start ups</p>   | <p>To contribute, share and learn</p> | <p>Team work, leadership, ability to listen and bring things to conclusions</p>   | <p>0.5-1 day</p> |

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| Peter | Glynne | Fellow | Over 25 years experience in project and programme management. Fifteen years experience with the APM leading and being involved in different SIGs and Branches.   | Continued involvement   | A lot of experience within the APM. Thought leadership. | 1-2 hours                |
| Steve | Leary  | Fellow | Steve has over 25 years' experience of business and IT change through portfolio, programme and project management. He has managed major portfolios and programmes with over 100 onshore and offshore staff, developing strategy, motivating teams, embedding change and delivering benefits. Roles have included consultant and interim manager in the pharmaceutical, manufacturing, banking, finance, government, utilities and education sectors. Steve is a Practitioner in both Managing Successful Programmes (MSP) and PRINCE2, a Chartered Engineer, Fellow of the APM | An interest in helping develop the profession of portfolio management and to utilise some of my past experience in this area. The SIG has enhanced its reputation in the last few years with our successful conferences, the portfolio directors' dinner and increasing engagement with branches, other SIGs and our members and I would like to contribute to further success. | Experience, enthusiasm and professionalism.             | About a half day a week. |

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|         |        |        | and currently co-chair of the APM Portfolio Management Special Interest Group. Steve is also co-author of the APM Guide to Portfolio Management. Currently Steve is a Managing Consultant at TCS, leading major programmes and portfolios for clients. |   |  |  |
| Richard | Moor   | Fellow | Currently Head of Portfolio for Royal Mail Operations I have over 15 years experience as project, programme and Portfolio professional. I currently manage a large Portfolio delivering transformational change to the Royal Mail operation.           | I am passionate about driving knowledge and sharing experiences across the industry. As a current SIG committee member (2 years) I am keen to continue to support the development of APM publications on portfolio management, and particularly finish the Portfolio Management Guide. There is plenty of good practice, we need to share this to ensure all portfolios are successful. | Working in a live portfolio today I aim to supplement thinking with real live experience. I am keen to support the SIG in sharing knowledge across industry professionals. | On average I support the SIG for 4-5 hours per week currently. |
| Dwain   | Morgan | Fellow | A Portfolio Manager, already sitting on the APM SIG for PfM. Nominating myself for a 2nd term  | Frist year on the SiG was an interesting one meeting likeminded people from different industries. Great way to be at the cutting edge of thinking in this manner  | Already a committee member and wish to continue in 2020  | 2-3 hours a week   |

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| Judd  | Norton | Fellow    | Previously, a Senior Project Manager and Head of Projects and Portfolios, leading and managing a multi-disciplinary team of professionals, including multiple external contractors and suppliers to deliver a portfolio of concurrent strategic and client driven projects, programmes and transformations, whilst managing portfolio dependencies and risks etc. More recently as a consultant, working with large global insurance/financial firms to provide portfolio change audit/assurance services. | Senior professional project/programme/portfolio manager with solid experience across multiple industries in a global capacity, passionate about the profession overall, especially the future in how initiatives and APM more generally will benefit society. I am highly motivated and excited to be a part of this committee. | A versatile client and business focused Project / Programme / Portfolio Manager with over 15 years' experience leading change and transformation initiatives in Information Technology, Software, Healthcare, Media, Telecommunications, Public Sector, Legal, Education, Research, Insurance and Financial Services sectors in UK, Europe and Australia | 1hr +<br>(depending on work commitments) |
| Nancy | Olson  | Associate | I have over 25 years experience in Project, programme and portfolio management in the UK and internationally. I am currently a Senior Fellow lecturing on Portfolio and Programme Management at Masters level.   | I have been on the committee for 3-4 years now and I would like to continue to contribute towards the development of the profession and the discipline.   | A strong strategic perspective, well-rounded experience and enthusiasm combined with good organisational, problem-solving and communications skills.   | 3-4 hours per week                       |

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| Gemma   | Parker  | Associate | I am currently a Project Manager working in a Change Portfolio Office on strategic projects. Previously I worked on developing and setting up a portfolio management office.   | I am currently a member of the APM Portfolio SIG Committee having joined in July 2018. Having worked in project management for over 5 years, I have developed a keen interest in portfolio management and enjoy volunteering for the APM.   | I have been involved with the APM since 2017, firstly as a Wessex branch member and then as a Portfolio SIG member. I have an MSc in Business Project Management with Distinction and I developed my interest in portfolio management during my studies. I aim to bring enthusiasm to the committee and I am prepared to get involved and help where I can. I have enjoyed my first year as a SIG member being actively involved in organising the recent conference and developing Branch/SIG coordination.           | 1-2 hours per week |
| Stephen | Parrett | Full      | My professional life was centred on the financial services industry, starting in retail banking and moving into change management from 1990 (project management and then portfolio management, mainly at the corporate level). My prime focus was on developing and managing a range of different portfolio operating models (e.g. IT-only and IT/business - at divisional level and enterprise level), plus | With over 20 years of portfolio management (PfM) experience, I joined the inaugural PfM SIG Committee in 2010 to support further development of the discipline, applying my knowledge and experiences. It is a pleasure to be involved with a group of like-minded people committed to seeking fresh insights and extending the reach of PfM for the wider professional community. I am most interested in building relationships with other APM groups and improving support for APM members interested in PfM. I also | I bring many years of portfolio management experience, including steering PfM development through various organisational cultures, structures and committees. I have good organisational skills, perseverance, adaptability and first-hand knowledge of a variety of change management environments. I have developed a good understanding of how the APM works through being on the Portfolio Management SIG committee since its formation in 2010, and being its Chair from 2012/13 to 2016/17 and co-Chair 2017/18. | 3-4                |

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|      |           |           | <p>portfolio reporting to executive-level committees. In 2005, I became an independent consultant specialising in portfolio management, benefits management, and business case development, working across private and public-sector organisations.</p>   | <p>see a particular need to promote awareness of PfM to the senior executive level in organisations.</p>   |   |  |
| Neil | Pattinson | Associate | <p>A Portfolio Management professional working for Sellafield Limited (SL) in the nuclear industry. I am Portfolio Manager for one of seven portfolios in our £2Bn/yr enterprise. I am responsible for the identification, definition and delivery of multiple programmes of work in the field of nuclear materials. These will be flight for a significant duration (decades) - over £3 billion of investment. I established the portfolio, was responsible for the Portfolio architecture: Portfolio Definition and</p> | <p>My aspiration is for Sellafield Ltd to become a world class beacon on Portfolio Management. We are an early adopter of these practices within the nuclear sector. Joining SIG enables me to share our approach, gain valuable learning from other industries and make portfolio management the standard approach on how to effectively and efficiently do business. As a practitioner who has been piloting our practices, I believe I'm ideally placed to bring pragmatic, in the moment experience and show how the application of the theory translates into managing a live portfolio. My company has asked me to step forward on behalf of the company</p> | <p>I am a motivated, diligent portfolio professional with 18 years managerial experience working at the Operational, Programme Management and Portfolio Management levels in the nuclear industry. I have a really good understanding of the balance that is required to effectively manage a Portfolio, I have experience in overcoming a culture of resistance to change, in terms of adopting a portfolio management approach. I currently manage a wide and diverse portfolio of programmes and operations, which require significant inter-personal skills, the ability to concisely articulate key messages, the ability to problem solve to identify and implement the most appropriate solution to complex issues all</p> | <p>This is very dependent on current workload, however, I believe I could dedicate up to a working day a month, or a couple of hours a week.</p> |

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|       |           |           | <p>Strategy, the Portfolio Prioritisation Register, programme mandates, portfolio governance framework, Portfolio and Programme Management Plans, Portfolio benefits definition, profiling, tracking and management, managing the Portfolio and Programme level risk processes and developing the Portfolio Status Report. Prior to this, I developed my career in Programme management, leading the way in our company with its first programme. I grew my experience as Programme Manager, Business Change Manager and Senior Operations Manager across different business areas.</p> | <p>and bring our experience to the wider group and take best practice back to improve our business. I am recognised within my company as an expert and this is an opportunity to gain personal development on the wider field as well as enhance my company capability.</p> | <p>whilst maintaining the highest standards in safety and security. I have experience in negotiating and navigating cross cultural issues and delivery in ambiguous environments. I also sit as a non-executive director for a Cumbrian based social enterprise providing support, advice and guidance to young people.</p> |   |
| Lynne | Ratcliffe | Associate | <p>I became a project Manager at the YBS in May 2007 and during my time as a PM I successfully delivered numerous projects. I joined the Portfolio team as</p>  | <p>I like to learn and believe there is much I can learn from the committee members as well as being able to share my knowledge. I would also be proud to be part of research</p>   | <p>I am friendly, committed and have excellent people skills. As mentioned earlier my need to constantly learn will help me with the research and support of committee tasks. I have also been a part of the YBS team that have developed a</p>   | <p>As in previous years approx. 1 - 5 hours</p> |

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|      |         |      | <p>Governance Manager in October 2013 and have worked to deliver standards to help drive effective systems to enable the reporting / management at Portfolio Level and to feed into our board and change board for effective decision making. Recently my role changed to be a Governance and Assurance Consultant in which I still develop standards but also ensure programmes and projects are set up for success and evidence that they are in control</p> | <p>that helps define guidance and standards for the APM.</p>      | <p>true Portfolio Management capability. Which have given me skills and knowledge that would be beneficial to the SiG.</p>  |                          |
| Adam | Skinner | Full | <p>I have worked as a Portfolio and Programme Management Office Consultant for the last 15 years and have extensive experience across a range of sectors as well as a MSc in Major Programme Management from Oxford University.</p>  | <p>I am a keen believer in supporting the APM as a volunteer.</p> | <p>I bring a deep practice knowledge about how to deliver Portfolio's and complex change as well as significant experience organising events and drafting thought-leadership.</p> | <p>2 hours per week.</p> |

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| Tony | Whitmore | Associate | <p>I manage the IT portfolio within a large research intensive University, and lead a team of project professionals. I have 10 years' experience in IT management, later specialising in project management before developing into a portfolio management role. I enjoy working to develop the alignment of a portfolio with strategy, and have recently been working to integrate the IT portfolio with the wider organisational strategy.</p> | <p>I have a strong desire to see the practice of portfolio management grow, particularly in the Higher Education sector. The SIG represents a great opportunity to learn and share best practice, and I am keen to reflect the needs of members in the group's activities. I was co-opted onto the SIG committee in 2018 and have enjoyed contributing to it. I worked on the creation of the LinkedIn group and managed the last two newsletters from the group. I am committed to helping the group develop, so I am pleased to stand for election in 2019.</p> | <p>I have been active in the project profession for nearly a decade, and have first-hand experience of managing complex technical projects as well as developing my portfolio management skills and developing wider strategic management responsibilities. So hopefully that means I am organised, professional and committed to the job, with a desire to see portfolio management grow in maturity as a discipline!</p> | <p>1-2 hours.</p> |
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