



UNIVERSITY OF LEEDS

## CANDIDATE BRIEF

Portfolio Officer (Performance Analytics), Business Change



**Salary: Grade 6 (£27,511 – 32, 817 p.a.)**

**Reference: CSBCT1016**

## Portfolio Officer (Performance Analytics)

### Business Change Team

**Do you thrive on working across a broad portfolio of projects in a complex environment? Are you comfortable analysing and presenting project reporting data? Would you like the chance to support Executive decision-making for projects and programmes? If so, this is an exciting opportunity for you to make a real difference to the management of strategic change initiatives in a world-class organisation.**

You will join a small influential team playing a pivotal role in supporting senior leaders across the university in the implementation and delivery of strategic initiatives through providing specialist Portfolio Office services.

In this role, you will monitor and analyse the performance of the University's strategic change portfolio. You will have the opportunity to deliver and evolve the portfolio office's data collection processes and reporting content. There is a varied stakeholder base, who require orientation around project data and management information, and so your ability to articulate and convey your findings is essential.

You will need an ability to balance priorities, deal with complex academic and financial information, and work consultatively with others in order to succeed. This role sits alongside the Portfolio Officer for Systems Development to drive the quality of project data reported to the University's senior team members. Working with limited supervision, the ability to organise and work to deadlines will be critical to the success of the role.



## What does the role entail?

As a Portfolio Officer your main duties will include:

- Develop project, programme and portfolio management tools and methods, ensuring the Delivering Results product inventory is updated with these products, and the portfolio processes are documented in-line with the team's standards for documenting and modelling processes;
- Work with Project / Programme Managers to drive quality standards in portfolio reporting and governance documentation, ensuring they are adhered to;
- Support and deliver elements of team training and PMO inductions for new Project / Programme Managers;
- Collating and synthesising information from strategic projects and programmes to enable portfolio-level reporting and decision making through the production of regular portfolio, programme and project dashboards;
- Analysing project deliverables, finance, risk, dependencies, resource demand and other elements of project management information for projects in delivery and the pipeline, following up with Project Managers, Project Leads and Executive Sponsors as required;
- Providing a secretariat function for governance meetings as required; requesting and collating the relevant papers and taking minutes to ensure an accurate record is kept of decisions;
- Ensuring auditability of investment appraisal documents and baselining the information contained within;
- Establishing effective relationships across the University to gather relevant project data, especially between the PMOs to share best practice and align processes, and where appropriate lead Delivering Results advocacy sessions with stakeholders from across the University;
- Recommending where appropriate, aspects of continuous improvement that support the Portfolio and PMO's activity and supporting internal projects throughout their lifecycle to deliver new Portfolio and PMO capabilities utilising the full Delivering Results Methodology;

These duties provide a framework for the role and should not be regarded as a definitive list. Other reasonable duties may be required consistent with the grade of the post.



## What will you bring to the role?

As a Portfolio Officer you will have:

- Experience of communicating complex information and processes to stakeholders across an organisation;
- Excellent attention to detail in reviewing and presenting both data and written communication;
- The ability to build trust and credibility with senior leaders, acting as a reliable source of information;
- Strong networking and influencing skills, to operate in a complex environment and gain information from relevant parties;
- The ability to use diplomacy to appropriately challenge key stakeholders if required information quality standards are not met, escalating queries where necessary;
- Experience of supporting and tailoring the use of project and programme reporting approaches with stakeholders, i.e. Risk, Benefits, Deliverables;
- Worked in a project, programme or portfolio environment;
- The ability to shape your own work to meet the evolving needs of a newly established function;
- Evidence of recommending continuous improvement activity in any context.

You may also have:

- Experience in Microsoft Project, Project Online, SharePoint or other collaborative project tools;
- A Prince 2/ P3O or other relevant project management qualification (e.g. APM / PMI);
- Experience of supporting governance meetings through organising and reviewing papers, and taking accurate minutes and actions;
- A basic knowledge of organisational finance and investment processes.



## How to apply

You can apply for this role online; more guidance can be found on our [How to Apply](#) information page. Applications should be submitted by **23.59** (UK time) on the advertised closing date.

## Contact information

To explore the post further or for any queries you may have, please contact:

**Katherine Ingham, Head of Business Change Portfolio and PMO**

Tel: +44 (0)7850 966 022

Email: [K.A.Ingham@leeds.ac.uk](mailto:K.A.Ingham@leeds.ac.uk)

## Additional information

### Working at Leeds

Find out more about the benefits of working at the University and what it's like to live and work in the Leeds area on our [Working at Leeds](#) information page.

### Candidates with disabilities

Information for candidates with disabilities, impairments or health conditions, including requesting alternative formats, can be found on our [Accessibility](#) information page or by getting in touch with us at [disclosure@leeds.ac.uk](mailto:disclosure@leeds.ac.uk).

## Criminal record information

### Rehabilitation of Offenders Act 1974

A criminal record check is not required for this position. However, all applicants will be required to declare if they have any 'unspent' criminal offences, including those pending.

Any offer of appointment will be made in accordance with our Criminal Records policy. You can find out more about required checks and declarations in our [Criminal Records](#) information page.

