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| **Role title:** | Portfolio Planning and Performance Manager | **Responsible to:** | EPMO Lead |
| **Division:** | Transformation Management Office | **Department:** | Enterprise Programme Management office |
| **Direct Reports and Level:** | Demand Analyst and EPMO Planner | **Scope:** | All MPS Portfolio |
| **Scale:** | Up to 2 direct reports |
| **Regulated Function(s) Held:** | No |
| **Evaluation Level** | Implement 1 | **Role Family** | Digital, Data and Change |

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| **Overall Role Purpose** |
| This position will contribute to planning and performance services at an Enterprise level and support the development and management of a best practice Programme Management approach in MPS. Responsible for overall health of the portfolio  Responsibility will be to Maintains both the future plan of ideation and forecast (plan on a page), and the portfolio level plan - highlighting portfolio health, insights, tracking changes and provide update reports. Develop and maintain meaningful reporting of utilisation and key usage trends, providing insight against KPI’s by role type and person. Rescheduling portfolio to reflect changes in priorities and loading performing ‘what if’ to establish costs and timelines for delivery of new initiatives. Manage and support Portfolio Planner and Portfolio Demand Analyst. Ensuring Benefits Realisation is captured, tracked and reported on through whole lifecycle of initiative and at Portfolio level. Deliver a clear and reportable overview of the health of the full MPS portfolio to support Governance and decision making. Communication: Ensures continuous and clear communication, crucial for the successful navigation and management of Book of work. |

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| **Accountabilities (RACI)** | **Measures of Success/KPI’s** |
| **Operational**  Provide leadership across Change to deliver on the overall corporate strategy, business performance, leadership of teams that reinforces the desired culture and delivery of strategic priorities.  It is key the role is providing insight and analysis on the delivery of the Portfolio through the planning and performance function to enable MPS to make effective decisions. Providing a portfolio level plan that is easy to understand and has sufficient insight for both MPS and external partners. The role needs to Develop a portfolio performance strategy and framework through identification, tracking of key metrics aligned to strategic outcomes and monthly reporting on these measures. | * MPS priorities Vs plan * Division Plan delivery Vs plan * Delivery of projects to plan * Operational Metrics Vs SLAs |
| **Financial**   * Manage and develop the production of metrics on plan to inform business decisions and actions which results in a measurable improvement in business performance and trends * Contribute to cost savings targets, cost avoidance, and initiatives aligned to MPS achieving its cost and budget targets * Ensure that vendor/supplier spend is within contractual constraints. | * Operational budget Vs Plan * Member numbers Vs plan * Income Vs plan. * Retention targets delivered Vs plan. * Reports communicated on supplier divisional compliance. |
| **Member**   * Seek opportunities to continuously improve ways of working and contribute to team, department and divisional continuous improvement projects aimed to drive operational efficiency and great member experiences and outcomes * Deliver on KPIs, financial targets and great member experience and outcome. * Always deliver fair treatment and outcomes for Members and compliance with associated policies and standards set out by Council, its committees, and delegated authorities. | * Net Promoter Score * Member satisfaction survey results Vs plan * Stakeholder feedback * Operational Metrics Vs SLAs * Quality monitoring / outcomes testing scores / compliance testing and internal audit scores |
| **People**   * Maintain a strong culture of challenging if required to ensure processes are followed across the business and accurate data is maintained. * Build and maintain an effective team * Contribute to the development of resource management within the EPMO team and the wider business. * Take an active role in promoting a more inclusive environment, which aligns with our commitment to celebrate and promote diversity. * Build key relationships with internal and external stakeholders as necessary to ensure efficient and effective resource data and support decision making. * Provide strong leadership to ensure the training, competence, performance and engagement, ensuring colleagues have clarity on their accountabilities and comply with all governance, policy standards and processes. * Build a strong pipeline of talent and succession across for the benefit of MPS which will mitigate workforce planning risks and maximises the performance and potential of employees. | * Compliance with Training and Competence Schemes * Delivery of Personal Development Plans to plan * Strong Talent and Succession Plans * HR Metrics – attrition, absence * Delivery of People Plans * Stakeholder feedback |
| **Risk**   * Identify and report risks and issues identified within the Division and across MPS to enable resolution and mitigation of potential impact on MPS, members and colleagues. * Adhere to business processes and controls which are in place to manage the Department within risk appetite; comply with policies and regulatory requirements (as applicable) * Comply with applicable professional ethical guidance, external regulation and all relevant internal policy and procedures, including those relating to health and safety, data protection and IT security. | * Compliance with organisational Risk & Control policies and processes * Risk & Control Self- Assessments * Audit Actions Internal and External audit outcomes |

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| **Responsibilities (RACI)** |
| * Develops the long term strategy and annual operating plan. * Collects and evaluates internal and external information that may affect the organization’s present and future state * Coordinates the development of annual departmental operating targets and business plans. * Leads and develops in coordination with Finance the MPS wide annual budget and any other projections as required by Executive Management and/or relevant Management * Develop project prioritization in coordination with EPMO based on management priority in MPS |

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| **Key Governance Responsibilities** |
| * Participate in MPS Committees and sub-groups (where required) * Offer meaningful decision points and insight to MPS forums to ensure that the business operates within risk appetite, and decision makers are fully informed and equipped. * Keep abreast of evolving legislation and best practice; identify and recommend opportunities for MPS to become more efficient and effective. * Lead individual projects and change or delivery activities as required. * Role model MPS values and behaviours. * Manage the impact of change initiatives, leading implementation projects, communicating and championing change to the department, and ensuring effective transitions to new ways of working * Undertake other duties and tasks that from time to time may be allocated that are appropriate to the level or role. |

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| **Leadership Framework Competencies** | **Level** |
| Fresh Thinking | Leading Self |
| Building Capability in Self and Others | Leading Self |
| Influencing Others | Leading Self |
| Collaborating for Results | Leading Self |
| Leading Self and Others | Leading Self |
| Commercial and Risk Thinking | Leading Others |

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|  | **Knowledge and Qualifications** | **Skills** | | **Experience** |
| **Essential** | * Provide planning and strategic advisory to Executive Management in the area of strategy, planning and projects. * Performance Develops, improves, and maintains MPS Performance Management Framework * Coordinates the development of the annual departmental and divisional performance plans and dashboards, cascading and translating the corporate goals and objectives into specific departmental and divisional performance targets. * Generates monthly, quarterly, and annual performance reports for submission to the Secretary General. * Develops performance action plans and monitors the same based on direction from MPS executive team with the support of the user Department/Division. * Conduct organizational assessments and develop organizational guidance to set forth the priority performance outcomes for the Department. * Improve performance management infrastructure that supports the operation of the Performance Management Framework and performance reporting activities | * Good communicator – ability to communicate to a broad audience and converse with all levels * Strong organisational skills – organising self and balance of multiple activities / deliveries * Can process, manipulate, analyse and interpret data * Can cope with the big picture and detail * Able to think cross-functionally (not just one discipline) * Able to identify and remove barriers to change * A good knowledge of customer focused, and analysis led change methodology | * Experience with strategy, business planning, and the development of corporate Performance Management Frameworks, specifically Balanced Score Cards. Experience in project management and organisational change management. * Experience with performance management software/solutions is an advantage | |
| **Desirable** | * Project management qualifications * Experience with working with technical teams |  | * Previous experience of transformation * Experience of operating in a complex, commercial, multi-divisional organisation. | |