



## THE ROYAL BRITISH LEGION

### JOB DESCRIPTION

<b>Job Title:</b>	<b>Corporate Portfolio and Reporting Manager</b>
<b>Reporting to:</b>	Assistant Director - PMO
<b>Responsible for:</b>	Portfolio Support Officer
<b>Role Purpose:</b>	The Corporate Portfolio and Reporting Manager's role is to: <ul style="list-style-type: none"><li>• Manage and coordinate the portfolio of programmes and projects across the whole RBL</li><li>• Provide management information on the portfolio and subject matter expertise to all stakeholders</li><li>• Maintain and manage the current Corporate Balanced Scorecard, (CBS).</li><li>• Provide technical support and guidance for the development of KPIs</li></ul>

#### **Key Responsibilities:**

- Responsible for the portfolio of projects across the whole of TRBL and provide monthly reporting on the portfolio to a senior management team that includes Directors and Assistant Directors.
- Responsible for supporting the embedding of the project and programme management methodology.
- Responsible for providing guidance and management information to support the correct alignment of projects to strategic aims, organisational priorities and aid discussion making at Executive level.
- Responsible for ensuring projects and programmes have the correct risk levels and ensure the risk register is kept up to date.
- Support the PMO Business Partners to provide high quality guidance and support as well as building meaningful and supportive relationships across the whole TRBL project and programme management community.
- Responsible for the creation of the monthly portfolio reporting pack including draft commentary for TRBL's Executive Board.
- Support the PMO Business Partners to produce Directorate level portfolio reporting.
- Responsible for, and for the development of, any changes with the Portfolio tracking and management tools, ensuring that the status of all projects and programmes are reflected accurately.
- Responsible for the creation of monthly Corporate Balanced Scorecards, (CBS), and the collection of any supporting commentary for TRBL's Executive Board.

- Responsible for the creation of Board of Trustee (BoT) KPI reports and attend meetings if required.
- Lead the development of new / refined KPI's for inclusion onto the CBS.
- Be the subject matter expert on all areas of CBS and KPI reporting throughout the organisation.
- Provide technical guidance and support around the development of Directorate level KPIs and any associated Balanced Scorecards, including providing support as capacity allows and/or advising on the selection of external support.
- Support the Assistant Director PMO on the scheduling and management of formal reviews of all PMO processes, procedures and templates, as appropriate.
- Manage the change control procedures for all project and programme related processes, procedures, templates, KPI development, CBS and any associated data dictionary.

Any other duties as are within the scope, spirit and purpose of the job, the title of the post and its grading as requested by the line manager.

## GENERAL

- To implement the Equal Opportunities Policy into your daily activities.
- To be responsible for your own health and safety and that of your colleagues, in accordance with the Health & Safety at Work Act (1974) and relevant EC Directives, including reporting any health and safety hazard immediately you become aware of it.
- To work in accordance with the Data Protection Act (1998) and to ensure all new systems are reported to the Data Protection Officer.

## PERSON SPECIFICATION

CRITERIA	ESSENTIAL / DESIRABLE	HOW TO BE MEASURED
<b>QUALIFICATIONS</b>		
Degree level or equivalent experience	E	Application
Professional project / programme management qualification	D	Application
<b>KNOWLEDGE &amp; EXPERIENCE</b>		
Extensive experience of managing a Corporate Level project and programme portfolio	E	Application / Interview
Extensive experience of developing and writing portfolio reports, for various audiences within an organisation	E	Application / Interview
Experience of a range of best practice methodologies for both portfolio management and performance improvement activities	E	Application / Interview

Experience of KPI's, their development in a range of settings and sectors	E	Application / Interview
Demonstrable experience of implementing continuous improvement activities	E	Application / Interview
Demonstrable experience of managing business change and all associated activities	E	Application / Interview
<b>COMPETENCIES</b>		
<b>Effective Communication</b> <ul style="list-style-type: none"> <li>• Uses all available methods of communication effectively</li> <li>• Engages team and peer group through clearly communicating the team vision</li> <li>• Communicates complex messages and strategies effectively using methods appropriate to recipient</li> <li>• Supports and encourages team members to develop and improve their communication skills</li> </ul>	<b>Level 2</b>	Application / Interview
<b>Results focus</b> <ul style="list-style-type: none"> <li>• Demonstrates tenacity in pursuit of personal and team goals and objectives</li> <li>• Sets and works to meet challenging goals for self and others</li> <li>• Regularly reviews progress against objectives and seeks opportunities to improve.</li> <li>• Ensures consistent high standards in team and at peer group</li> <li>•</li> </ul>	<b>Level 2</b>	Application / Interview
<b>Planning &amp; Organisation</b> <ul style="list-style-type: none"> <li>• Monitors own and team workflow to ensure achievement of goals in a timely manner</li> <li>• Sets and communicates clear functional objectives for self and team delegating tasks to the most appropriate person as required.</li> <li>• Takes action to support achievement of team, department and organisation goals, changing plans where required.</li> <li>• Manages complexity, can balance multiple things at one time.</li> </ul>	<b>Level 2</b>	Application / Interview
<b>Customer Service</b> <ul style="list-style-type: none"> <li>• Develops clearly client driven strategic aims and objectives to effectively meet future needs</li> <li>• Turns client feedback into actions and priorities for future service provision</li> <li>• Promotes an environment where client / customer service is a priority</li> <li>• Embeds a 'customer first' culture within department / organisation</li> </ul>	<b>Level 3</b>	Application / Interview

<b>SKILLS &amp; ATTRIBUTES</b>		
Proactive self-starter, able to work unsupervised within agreed timeframes	E	Application / Interview
Effective communication skills – written and verbal	E	Application / Interview
Effective interpersonal skills – able to engage effectively with a range of audiences	E	Application / Interview
Strong planning and organisational skills - able to prioritise workload effectively	E	Application / Interview
Strong team player - able to work effectively with diverse client groups	E	Application / Interview
Professionalism, discretion and sound judgement	E	Application / Interview
Strong IT skills – competent user of MS Office and familiar with in-house database systems	E	Application / Interview
Experience with Portfolio management software	D	Application / Interview
Empathy with mission and values of the Legion	D	Interview