

## ROLE PROFILE

<b>Job Title:</b>	Portfolio Assistant	<b>Job Code:</b>	D/P11
<b>Department:</b>	PMO	<b>Version:</b>	1.0
<b>Reports To:</b>	Portfolio Manager	<b>Date Created:</b>	June 2017
		<b>Grade:</b>	H

<b>Is this a politically restricted Post?</b>	Yes/ No <i>(*if yes, see our policy on what this means)</i>
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## ORGANISATIONAL CONTEXT

### Our Vision as an organisation is:

To be a globally recognised economy where good growth delivers high levels of prosperity, jobs and quality of life for everyone.

### To achieve this we will:

Secure the means to deliver projects and services needed for growth in the Leeds City Region (LCR), be its voice nationally and internationally, and build the partnerships to ensure the best economic outcomes.

### Our department contributes to this by:

Ensuring the delivery of a portfolio of projects and programmes within the agreed cost, time and quality framework, which meet our strategic priorities and derive maximum benefit for the region.



## Job Overview:

- Support the Portfolio Management Office to ensure:
  - The successful implementation of controls and processes to support the Assurance Framework and portfolio delivery across WYCA and partners.
  - Effective monitoring and reporting on the performance of the portfolio of funding programmes that WYCA are responsible for.
  - The successful development, implementation and management of the Portfolio Information Management System (PIMS).

- © Take a pro-active approach to participating and delivering of your directorate's objectives.
- © Demonstrate commitment to corporate processes and ensure that these are delivered at all times.
- © Be a visible and enthusiastic team member, encouraging partnership working across the organisation.
- © Take a positive approach to self-development.

## CRITICAL SUCCESS FACTORS

*We break each job down to explain the critical areas for success, ranked by importance.  
These indicate the end result or outputs for which the role holder is responsible.*

### People Contacts:

- Interface with internal and external programme and project managers to understand and communicate the assurance process and PIMS.
- Communicate with internal and external programme and project managers requesting monthly and quarterly monitoring information and collate responses.
- Co-ordinate the annual diary of monitoring and reporting to ensure reports are completed in time for the relevant meetings.
- Co-ordinate, arrange and support:
  - Internal monthly and quarterly monitoring and management meetings including minute taking.
  - Monthly, quarterly and annual meetings with external funding bodies.

- © Support partnership working across the organisation and externally.
- © Work together with your team to ensure targets are achieved.
- © Be an advocate of our strong performance management culture, taking accountability for delivering results.
- © Contribute to a positive working environment for your team, with a solid ethic of working towards achievement of our vision.
- © Take a proactive approach to internal processes, contributing during meetings and interviews.
- © Utilise effective communication channels when working with others.

### Technical Duties:

- Under the direction of the Portfolio Manager (Monitoring and Reporting) compile reports on performance, i.e. spend, outputs, outcomes / benefits, progress and risk and issues.
- Under the direction of the Portfolio Manager (Monitoring and Reporting) compile spreadsheets in order to analyse and interpret performance data and summarise the results.
- Support the Portfolio Manager (PMO Systems) in the successful development, implementation and management of the Portfolio Information Management System (PIMS).
- Support the Portfolio Managers (Controls and Process) in the successful implementation of controls and processes to support the Assurance Framework.
- Use the computerised ordering and payments system and manual processes to raise orders, process and certify invoices and claims for payment whilst ensuring compliance with Standing Orders and Financial Regulations.
- Support the co-ordination and management of income from third parties and the distribution of funding to partner organisations.
- With support from the Portfolio Managers, be responsible for prioritisation of own tasks and work to tight deadlines.

- © Typically works on horizons of up to one year, in line with the objectives set in the business plan.
- © To uphold procedures in place to achieve your strategic objectives, suggesting amendments to processes as required.
- © Ensuring compliance with the Combined Authority's health and safety policy.

### Impact & Influence:

- Support the forming and development of effective working, being a source of guidance and advice on PMO controls, processes and governance with regards the Assurance Framework, PMO monitoring, reporting and PIMS, both internally and to external partner organisations.
- Establish and maintain effective working relationships with partner organisations. Be part of the 'voice' of project delivery.

- Support the delivery of the projects needed for the growth of the City Region.
- Influence peers, suppliers and Delivery Partners, by sharing best practice and lessons learned.

- Ⓞ Represent the interests of your team within the context of the wider aims of the Combined Authority both internally and externally.
- Ⓞ Fosters good working relations across the organisation, building effective team relationships.

*The above lists of accountabilities are not exhaustive. The role holder will be required to undertake such tasks as may reasonably be expected commensurate with the scope and grading of the role.*

## THE PERSON

*To be fully successful in the role, we believe the following knowledge, skills and experience are required. When recruiting, we are looking for the best candidate match to this, however we know that there are some elements that can be trained and this will be taken into account during the recruitment process.*

### Knowledge:

- Ⓞ Educated to degree level or equivalent relevant or relevant demonstrable practical experience.
- Ⓞ Practical experience of successfully performing in a similar role.
- Ⓞ Experience of analysing performance information at a programme and project level.
- Ⓞ Understanding of programme and project management methodologies, including risk management and benefits realisation.

- Hold a relevant professional qualification in portfolio, programme or project management (e.g. PRINCE2 Foundation, MSP Foundation).
- Extensive knowledge and experience of Microsoft Office (particularly Excel, Word and Outlook).
- Knowledge and experience of MS Project and SharePoint.
- Knowledge of public sector financial procedures.

### People:

- Ⓞ Experience of effectively contributing to team objectives.
- Ⓞ Experience of successfully identifying appropriate communication channels to deliver information.
- Ⓞ Experience of effectively contributing to organisational vision.

- Experience of performing a support role within a multi-disciplinary team.
- Experience of successfully participating in meetings, including taking minutes.
- Experience of effectively engaging with staff within WYCA and representatives of partner organisations.
- Experience of working with technical experts.

### Technical:

- Ⓞ Strong negotiation skills.
- Understanding of the purpose of a PMO and assurance/gateway processes.
- Experience of compiling reports on performance, e.g. spend, outputs, outcomes / benefits, progress and risk and issues.
- Experience of compiling spreadsheets in order to analyse and interpret performance data and summarise the results.
- Experience of compiling guidance and template documentation.
- Experience of prioritisation of own tasks and working to tight deadlines under pressure.
- Ability to exercise own judgement to solve problems within own sphere of responsibility, or to escalate as appropriate.

## Impact & Influence:

- Experienced in forming and developing effective working relationships with programme and project managers in WYCA and partner organisations to achieve the best outcomes for the organisation, including experience of negotiating with or influencing others.
- Be part of the 'voice' of project delivery, with the ability to respond efficiently and effectively to requests from internal and external customers and stakeholders.
- Experience of supporting project delivery.
- Experience of producing meeting documentation in a clear, concise and credible style.

## OUR VALUE & BEHAVIOURS

**Championing Our Region | Working Intelligently | Easy to Do Business With | Positive About Change | Working Together**

These are our values. We shaped them together and we're proud of them.

We also created a set of behaviours for each of our values. Our behaviours provide us with a way of working and they are our minimum expectations of everyone here.