



Role Description – Portfolio Manager

Role title	Interim Portfolio Manager	Grade	Department	Portfolio
Reports to (1)	Chief Commercial Officer		Direct reports (1)	Yes
Key relationships / interfaces (1)	Internal:	APM Board, APM Executive, portfolio colleagues, APM Heads of Department, APM departments, stakeholders as identified by the portfolio requirements		
	External:	Stakeholders as required by the portfolio, including: accredited providers, Higher Education Institutes, corporate members, individual APM members, volunteers, other professional associations, regulatory bodies		
Role purpose (2)	<p>To manage a portfolio of projects focussed on product, process and system development, providing long-term delivery and project effectiveness. Providing project assurance to the APM Executive and Board for the portfolio of projects which will enable it to meet its operational and strategic objectives.</p> <p>To ensure current and future projects are delivered in line with best practice project management techniques appropriate to the type and scale of projects and delivering the identified business benefit.</p>			
Breadth of responsibility (3)	<ul style="list-style-type: none"> Working with APM's Executive and departments to create a roadmap for future development aligned and prioritised in order to deliver APM's strategic and business objectives Creating a consistent and effective approach to portfolio management and investment Establishing a suitable governance framework and portfolio structure in order to deliver the necessary project capability to support delivery of the road map and business objectives Delivering a complex series of related projects, effectively managing their interdependencies and allocating resources to support prioritised opportunities Providing coaching and guidance to the portfolio team, and building and managing meaningful and supportive relationships across the organisation. <p>The role holder will be:</p> <ul style="list-style-type: none"> A proven influencer and communicator with stakeholders at all levels An experienced portfolio manager with a strong background in portfolio assurance, governance and methodology Experienced in business analysis and strategic planning, including requirements definition and business case production Able to organise and lead a team to achieve objectives and targets 			



Dimensions and limits of authority (4)

The governance structure will ensure the Portfolio Manager has the delegated authority to successfully deliver the portfolio and the associated business benefits.

Key Responsibilities and Measures

Key responsibilities / accountabilities (5)	Key performance measures (6)
<p>PORTFOLIO MANAGEMENT</p> <ul style="list-style-type: none"> • Reviewing and updating APM’s project management framework and governance requirements • Managing a portfolio of multiple projects, managing their interdependencies, resourcing and any proposed changes which may affect project priorities • Monitoring the quality of project outputs to ensure strategic objectives are met • Conducting portfolio meetings and attend project meetings where required • Establishing effective working relationships with all stakeholders and ensuring effective portfolio communications 	<ul style="list-style-type: none"> • Updated policy and process documentation, stored and distributed appropriately • Delivery to an agreed plan, to required deadlines and in line with strategic objectives • Delivery of portfolio updates in line with the reporting requirements of the APM Executive and Board • Feedback from internal stakeholders, observed behaviours and performance review discussions
<p>PLANNING</p> <ul style="list-style-type: none"> • Working collaboratively with internal stakeholders to define an approach to create a roadmap for future development of products, processes and systems • Designing, developing and critiquing proposed project plans based on sound judgement and analysis • Listening for, uncovering and resolving potential conflicts or disagreements about project priorities • Ensuring portfolio resources are appropriate to enable the necessary operational and strategic capability 	<ul style="list-style-type: none"> • Delivery and maintenance of a portfolio plan and roadmap for development, showing key milestones, phase reviews and dependencies • Preparation of a phased portfolio budget, demonstrating spend in line with APM’s financial accounting periods • Identification of any constraints and threats that may impact the ability of the portfolio to deliver required business benefits
<p>TEAM MANAGEMENT</p> <ul style="list-style-type: none"> • Identifying resourcing needs in line with the portfolio plan • Providing line management, coaching and guidance to develop the effectiveness of the portfolio team 	<ul style="list-style-type: none"> • Management and, where necessary, recruitment of a portfolio team with the skills and experience required to deliver the portfolio

Key responsibilities / accountabilities (5)	Key performance measures (6)
<ul style="list-style-type: none"> Ensuring that portfolio colleagues understand their roles and accept their responsibilities in line with the agreed governance process 	<ul style="list-style-type: none"> Delivery of the portfolio in line with controlled plans Feedback from the portfolio team
<ul style="list-style-type: none"> Ensuring effective reporting of all projects to enable stakeholders, sponsors and management to make appropriate decisions 	<ul style="list-style-type: none"> Set up effective reporting processes to ensure a clear understanding of the status of projects and any decision making requirements

Person Specification – Portfolio Manager

Attribute	Description	Essential / desirable
Qualifications (7)	<ul style="list-style-type: none"> Qualified to first degree level, or equivalent in a relevant discipline Professional qualification in project management 	<ul style="list-style-type: none"> Desirable Desirable
Experience (8)	<ul style="list-style-type: none"> Proven experience of portfolio delivery including providing portfolio assurance and governance Proven experience of translating business analysis, requirements definition and business case production into practical implementation 	<ul style="list-style-type: none"> Essential Essential
Knowledge	<ul style="list-style-type: none"> Knowledge of and familiarity with membership/professional body roles, purposes, and Up-to-date evidence of effective portfolio management 	<ul style="list-style-type: none"> Desirable Essential
Skills	<ul style="list-style-type: none"> Effective negotiation and persuasion skills Expert planning and organisational skills Outstanding communication and inter-personal skills with the ability to clearly communicate with senior management and the board High-level of IT literacy Ability to co-ordinate colleagues, volunteers and contracted parties through expert leadership, motivation, teamwork, supervision and accountability Proven capability to manage stakeholders at all levels 	<ul style="list-style-type: none"> Essential Essential Essential Essential Essential



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Person Specification – Portfolio Manager

<p>Behaviour / competency (9)</p>	<p><i>Analytical thinking:</i> ability to tackle issues and problems in a logical, step-by-step way</p> <p><i>Concern for accuracy:</i> Desire to ensure accuracy and quality in work delivered</p> <p><i>Results orientation:</i> ability to set high goals for self and others, focusing on the delivery of targets, quality and deadlines</p> <p><i>Communication skills:</i> ability to communicate appropriate, concise and accurate information in written and verbal formats</p> <p><i>Creativity & innovation:</i> willingness to challenge assumptions and ability to adapt or generate imaginative and innovative ideas</p> <p><i>Influence & persuasion:</i> ability to convince others to your own point of view, to gain acceptance, support and commitment</p> <p><i>Interpersonal skills:</i> ability to understand and interpret other people’s behaviour, concerns and motives</p> <p><i>Relationship building:</i> ability to build and maintain networks of business contacts in and beyond the organisation who may contribute to success</p>	<ul style="list-style-type: none"> • Essential • Essential • Essential • Essential • Essential • Essential • Essential • Essential
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