Job description

Job title:	Portfolio Manager
Accountable to:	Director of Research
Salary:	£57,368 per annum plus excellent benefits
Contract type:	Permanent
Hours per week:	37.5 hours per week (core hours will be between 10:00am-3.00pm Monday to Friday in line with our new hybrid framework; individual preferences to be discussed and agreed).
	Diversity and inclusion is important to us, and we are open to queries about flexible working prior to interview, and during the appointment process with the successful candidate.

The Health Foundation

We are an independent charity committed to bringing about better health and health care for people in the UK.

Our aim is a healthier population, supported by high quality health care that can be equitably accessed. We learn what works to make people's lives healthier and improve the health care system. From giving grants to those working at the front line to carrying out research and policy analysis, we shine a light on how to make successful change happen.

We believe good health and health care are key to a flourishing society. Through sharing what we learn, collaborating with others and building people's skills and knowledge, we aim to make a difference and contribute to a healthier population.

Purpose of the role

The ambition of the Research team is to support the Foundation's mission to improve health, supported by high quality health and care services that can be equitably accessed. We do this by managing research grants and running commissions (involving academics, think tanks, front line staff, clinicians, people with lived experience and policy makers) and we develop links between the knowledge we gain from the above and those delivering health and care and policymakers.

The Research team has a 13.7 full time equivalent staff who commission research and deliver research insights across the Health Foundation's 5 strategic priorities: healthy lives, improvement, data analytics, sustainability and health and care policy.

The team's portfolio encompasses independent evaluations, evidence reviews, original research awards, and knowledge mobilisation activities.

The Portfolio Manager is a new senior role in the team which will be responsible for implementing and overseeing effective new approaches to resource management and portfolio and project management. They will report to the Director of Research as part of a central resourcing hub for the research team. They will need to work very closely with the Assistant Director of Research who is responsible for the quality of the research programme and its impact. This new role will support more effective working and strategic programme management across the team. It is critical that the post holder has the skills to work collaboratively involving all members of the research team in the design and operationalisation of approaches that are best suited to the team's needs.

The main purpose of the role is:

- To develop the research team's approach to programme management working with team members to devise and operate an approach suited to the team's needs.
- To oversee resource planning in the team, working with the Business Manager to align research funding with wider capacity to deliver projects and achieve impact from the research we have supported. To work with the team to embed effective project and resource management approaches
- To manage team administration coordinating the team's contribution to quarterly board reports, annual reports, business and strategic plans and impact analysis.
- Line manage a new post of research coordinator.

Key responsibilities and outcomes

Portfolio and Programme Management

- Designing with the team, and then overseeing a programme management approach for the total portfolio of research projects which outlines the current stage of each project (e.g. design, launch, awarding, implementation, monitoring, evaluation, learning and knowledge dissemination stage). Updating the portfolio in line with the annual business plan and emerging projects

- Providing an ongoing analysis of the portfolio to the research team Director and Assistant Director regarding which types of research investments are increasing, decreasing and the needs of other directorates. Leading on an annual business analysis review on the research team funding portfolio for the organisation.

- Supporting the research team to take a consistent approach to resource planning. Working with the team to create a multi-year forward plan of committed work, that outlines the time allocated to each stage of the project lifecycle and who it is allocated to. Analysing the forward plan to ensure sufficient time is available for the research team's strategic objectives, non-project time and emerging/responsive issues.

- Providing ongoing analysis of how much time is being allocated and spent on each of the Health Foundation's strategic priorities. Identifying any capacity issues

in advance and make recommendations on how these can be resolved to the Assistant Director and Director.

- Supporting the research team to take a consistent approach to resource tracking. Working with the research team to assess the accuracy of the forward plan and continuously improve its accuracy.

- Analysing the capacity demands of emerging and ongoing projects. Identifying the impact of emerging projects on the forward plan, and provide options to the Assistant Director for incorporating these – e.g., reallocation of team members; if current work is delayed - what impact will its new timeline have on other work within the forward plan. Identifying the overall demands of emerging needs and what resource would be needed to fulfil them entirely

Project Management

- Embedding new approaches to project management and have a central oversight of project management documentation. Ongoing assessment of portfolio, resource and project management approaches, learning and promoting continuous improvement

- Supporting the research team to take a consistent approach to project monitoring. Updating the forward plan based on the team's monitoring. Highlighting the potential impact of delays on other work to the Assistant Director. Ensuing the potential impact of any existing or emerging risks are escalated to the Assistant Director

- Work with the Foundation's central project management office to ensure corporate project management processes are adopted and lead on overseeing the team's usage of the project management system for managing and reporting on projects.

Research strategy

- Supporting and leading elements of the team's research strategy, including good governance arrangements for grant giving, rolling out the team's standard operating procedures and ensuring consistency across the team.

Team administration and management

- Overseeing the team contributions to corporate strategy, planning and reporting, including contributions to board reports, annual reports, impact analysis, business and strategy plans.

- Lead on designing the new Research Coordinator role and recruiting, managing and developing the new post holder.

Wider contribution

As with other staff at the Foundation, the postholder will be expected to contribute to corporate activities and initiatives, such as staff meetings, cross-Foundation leadership and development programmes and other corporate projects as necessary. The postholder will

also be expected to show active initiative in developing their professional expertise, and to demonstrate commitment to the Health Foundation's key behaviors: Commitment to Diversity and Inclusion; Working Together; Achieving Impact and Discovering and Learning.

Person specification

	Criteria	Assessment (CV/SS-Shortlist, T-Test, I-Interview)	Essential/ Desirable (E/D)
Behaviour	**Commitment to Diversity and Inclusion -** in all aspects of the Foundation's activities and service delivery.	**CV/SS, I**	**E**
Behaviour	**Working together –** Builds trust and influences stakeholders at different levels of an organisation and from different professional backgrounds	**CV/SS, I**	**E**
Behaviour	**Achieving impact –** Strives to deliver impact collaboratively, and understands the importance of bringing people on the journey to change	**CV/SS, I**	**E**
Behaviour	**Discovering and Learning –** A commitment to continuous improvement, striving to find new and improved ways to deliver effective team outcomes	**CV/SS, I**	**E**
Education	Project or programme management qualification, or equivalent professional experience	**CV**	**E**
Experience	Demonstrable experience of using effective facilitation skills to take a co-creation approach to developing new team approaches	**CV/SS, I**	**E**
Experience	A proven track record in resource management, and the ability to predict, track, analyse and report resourcing requirements	**CV/SS, I**	**E**
Experience	Significant, proven, experience of effectively managing complex programmes and projects with multiple stakeholders	**CV/SS, I**	**E**
Experience	Demonstrable experience of portfolio management and preparing and presenting portfolio analysis to support decision making	**CV/SS, I**	**D**
Experience	Experience of analysing and proposing scenarios to optimise capacity and strategic impact	**CV/SS, I**	**D**
Experience	A track record of creating, implementing and embedding project management approaches, with strong change management skills to support successful implementation	**CV/SS, I**	**E**
Experience	Prior experience of working in a grant making and/or health care organisation	**CV/SS, I**	**D**
Skills and abilities	Excellent interpersonal and team working skills with the ability to build strong productive relationships and achieve results without reliance on formal line-management authority	**CV/SS, I**	**E**
Skills and abilities	Excellent facilitation and listening skills to develop new approaches, solve problems and	**CV/SS, I**	**E**

	ensure buy-in and commitment to new ways of working		
Skills and abilities	Excellent analysis skills with a solid understanding of how to obtain, analyse and review data from a variety of sources and a keen eye for detail	**CV/SS, I**	**E**
Skills and abilities	The ability to communicate effectively through formal and informal means, including excellent skills in networking, oral and written communication and making presentations	**CV/SS, I**	**E**
Skills and abilities	Flexibility in approach to work to enable a fast response to changes in the external environment and changes in internal priorities	**CV/SS, I**	**E**
Skills and abilities	Excellent IT, database and numerical skills including sound knowledge of MS Office and project management systems and the ability to pick up new systems and support others with using these	**CV/SS, I**	**E**