

Job description

Portfolio Management Analyst

Reporting to:	PMO Lead
Salary:	Competitive plus excellent benefits
Grade:	Level 12
Contract type:	Permanent, full time or part time
Hours per week:	37.5 hours per week for full time. All staff are required to work in person for a minimum of two days per week, in line with our hybrid working policy. The post-holder may be required to undertake some work outside normal working hours.

About the Health Foundation

Health is our most precious asset. Good health enables us to live happy, fulfilling lives, fuels our prosperity and helps build a stronger society. Yet good health remains out of reach for too many people in the UK, and health and care services are struggling to provide access to timely, high-quality care.

The Health Foundation is an independent charitable organisation with a mission to build a healthier UK. We work to achieve this by generating high quality research and analysis; developing practical solutions to the biggest problems in health and health services; engaging, convening and building coalitions to build understanding, inform debate and drive action; and developing the long-term capability needed to transform health and care.

[More about us](#)

The Planning and Portfolio Management Team

The planning and portfolio management team is responsible for designing and delivering the Foundation's business planning activities and ensuring that the business plan is delivered and

impact is realised. The team also oversees the Foundation's portfolio of strategic and organisational change programmes – ensuring that there is appropriate consistency in methodology and approaches, governance and accountability, while ensuring that priorities and tensions are managed and that reporting is consistent and effective – through Portfolio Committee, the Executive Committee and to Board.

About you

We expect everyone who works with us to be committed to our values and to share our commitment to becoming a more diverse and inclusive organisation. Our values are **impact, evidence, integrity, and collaboration**. We also expect everyone to share our commitment to becoming a more diverse and inclusive organisation and to help deliver our [EDI strategy](#).

You will demonstrate an ability to understand how programmes are put together combined with an analytical mindset and the ability to work collaboratively with teams across the Foundation. You will be able to show how portfolio analysis supports leaders in their understanding or progress with a high level of attention to detail. You will also demonstrate the highest levels of integrity and trustworthiness and the ability to manage sensitive data consistently.

Purpose of the role

The Portfolio Management Analyst plays a critical role in supporting effective planning, monitoring, and governance across the Foundation's project and programme portfolio.

You will provide high-quality analysis, reporting, and insight to help leaders understand portfolio performance, risks, dependencies, and resource use. Working closely with project managers, programme leads, finance, and strategy teams, you will ensure accurate data, strong controls, and clear information that supports confident decision-making.

This role is ideal for a detail-oriented analyst who enjoys working with data, systems, and stakeholders in a complex, delivery-focused environment.

Key responsibilities

Portfolio Reporting & Analysis

- Collect, validate, and analyse project and programme data across the Foundation's portfolio.
- Produce regular portfolio dashboards, reports, and performance summaries.
- Track progress against milestones, budgets, risks, and benefits.
- Support forecasting, scenario analysis, and portfolio planning activities.

Governance & Assurance Support

- Support portfolio governance processes, including reporting cycles, reviews, and decision forums.
- Maintain portfolio-level risk, issue, and dependency logs.
- Support assurance activity by checking data quality, consistency, and completeness.
- Assist with preparation of papers for senior leadership, Boards, or committees.

Planning, Controls & Tools

- Maintain portfolio management tools, systems, and templates.
- Track resource allocation, capacity, and workload across the portfolio where required.
- Contribute to continuous improvement of PMO processes and reporting.

Stakeholder Collaboration

- Work closely with project and programme teams to gather accurate and timely information.
- Liaise with finance, strategy, and delivery teams to ensure alignment of data and reporting.
- Provide responsive support and guidance on PMO requirements and processes.

Learning & Development

- Support capture of lessons learned and good practice across the portfolio.
- Contribute to development of PMO guidance, training materials, and communities of practice.
- Build understanding of portfolio, programme, and project management disciplines.

Wider contribution

As with all employees within the Foundation, as a postholder you 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. You will also be expected to play a role in supporting the development of your team to enable continuous improvement and effectiveness.

As we do not provide visa sponsorship, candidates need to have the right to work in the UK at the time of appointment.

Person specification

Criteria	How we will assess this	Essential or Desirable
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Knowledge and experience

Experience in a PMO, portfolio, programme, or project support role	CV, Supporting statement, Interview, Assessment	Essential
Experience producing reports, dashboards, or performance analysis	CV, Supporting statement, Interview, Assessment	Essential
Confidence working with spreadsheets, reporting tools, and digital systems	CV, Supporting statement, Interview, Assessment	Essential
Experience in public sector, philanthropy, or mission-led organisations	CV, Supporting statement, Interview, Assessment	Desirable

Skills and abilities

Familiarity with portfolio, programme, or project management methodologies	CV, Supporting statement, Interview, Assessment	Essential
Strong analytical skills with attention to detail and data accuracy	CV, Supporting statement, Interview, Assessment	Essential
Strong organisational and time-management skills	CV, Supporting statement, Interview, Assessment	Essential
Clear written and verbal communication skills	CV, Supporting statement, Interview, Assessment	Essential
Experience with PMO or portfolio management tools (e.g. PPM systems)	CV, Supporting statement, Interview, Assessment	Essential
Knowledge of financial tracking, forecasting, or benefits management	CV, Supporting statement, Interview, Assessment	Desirable

Behaviours

Impact – support project and programme data and analysis that support the delivery of impact	CV, Supporting statement, Interview	Essential
Evidence – drive the development of evidence and data in portfolio assurance and reporting	CV, Supporting statement, Interview	Essential
Integrity – highest levels of integrity and honesty in the development of evidence in support of delivery	CV, Supporting statement, Interview	Essential
Collaboration – ability to collaborate across different areas to validate data and insights on the performance of the portfolio	CV, Supporting statement, Interview	Essential

Commitment to Equity, diversity and Inclusion (EDI) – An understanding of, and commitment to, equity, diversity and inclusion in the workplace and in our research and outputs

CV, Supporting statement,
Interview

Essential

The above is not an exhaustive list of duties. You may be expected to perform different tasks as necessary, based on your changing role within the organisation and overall business objectives.