

Portfolio Analyst



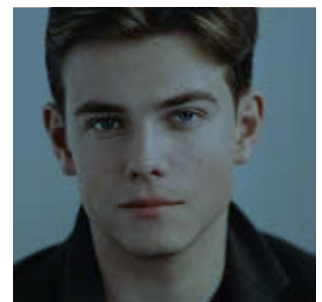
Too many older people have no one to turn to for support. We believe no older person should have to struggle alone. We're Age UK, the UK's leading charity for older people. We provide information, support, friendship and advice when it's needed most. Our services are a lifeline – could you help us reach even more people who need us?

The job, in a nutshell

We are seeking a Portfolio Analyst who will shape and support the delivery of the D&T Portfolio. The successful candidate will be responsible for supporting the high-level functions of portfolio management and performance monitoring of progress. This is a great opportunity for a talented individual with excellent organisational and stakeholder engagement skills, who has a high level of understanding of portfolio management and the functionality of reviewing against a portfolio backdrop. You will own, plan, manage the system we use to track work and conduct quality check on the performance of work including timelines, budgets and benefits realisation to include in reporting. The role will be responsible for conducting comprehensive analysis of the portfolios composition, risk profile and financial metrics to provide insights and recommendations for the organisation.

What you'll do for us:

- Facilitate the front-door process of new work submitted to the portfolio for scoring, ensuring an initial review is conducted and that the right people are then involved to evaluate the onward journey for the work.



“Data is becoming both a strategy and a culture at Age UK. The value of this is showing and will only continue to grow. It is a pivotal moment with the opportunity to see real change from the work taking place.”

Tom Jones
POWER PLATFORM
LEAD

Our values

- Collaborative
- Impactful
- Ambitious
- Inclusive

Portfolio Analyst



- Process the stage gate documentation, making sure compliance is adhered to and the correct information is provided and the correct time, ensuring appropriate decision making can take place.
- Compile data from reporting for the monthly portfolio forum for discussion with leadership teams, this will be utilising existing report and also finding data from other relevant sources.
- Deliver comprehensive reporting for Leadership Team, ensuring comprehensive analysis takes place and where appropriate recommendations or key call outs are part of the reporting process.
- Trigger reviews to assess ROI/Benefits and conduct an initial assessment for review.
- Maintenance of Portfolio Plan, including updates to timeframes and showing dependencies between initiatives.
- Ensure work owners provide their status updates in line with monthly reporting schedule.
- Manage the portfolio RAID log and track the progress of mitigations as well as raising non-compliance or missing information issues.
- Monitor and escalate non-conformance against minimum standards.
- Support the continuous improvement initiatives, including development of new ways of working, and triaging of new requests.
- Support inducting of new staff, ensuring they are aware of the tools, process and training needed.

Must haves:

Experience

- Experience working within a portfolio environment.
- Experience applying analytical thinking in the workplace.

Skills

- Awareness, understanding and experience of project, programme and portfolio management and their principles and methodologies
- Awareness and experience of assurance activities across projects, programme and/or portfolios.
- Good analysis skills and a trouble shooter able to anticipate risks and facilitate successful delivery.

Location

Hybrid

People management

No

Division

Group Finance (Finance, D&T, Strategy)



ageuk.org.uk

Age UK, 7th Floor, One America Square, 17 Crosswall, London EC3N 2LB.
Registered charity number 1128267. Company number 6825798.

Portfolio Analyst



- Self-motivated, proactive, and driven with an ability to work both independently and autonomously, but also as part of a team.
- Good interpersonal and communication skills with a track record of building collaborative working relationships.
- Ability to comfortably use Microsoft suites at an efficient level including Power BI & Microsoft Lists which are tools regularly used for reporting.
- Ability to plan, organise and prioritise work using initiative to work to deadlines.
- Ability to communicate (verbally and in writing) effectively at all levels internally and externally.
- Ability to work accurately and to a high degree of detail.
- Good problem solving, analytical and communication skills.
- Ability to liaise with staff at different levels and in different disciplines in an organisation.
- Collating and presenting performance management information.

Great to have:

Personal Attributes:

- High levels of initiative – capable of working in a logical manner without close supervision, but also knowing when escalation or approval is necessary.
- Organisation skills – time management, managing priorities and meeting deadlines.
- Multitasking, interpersonal and negotiation skills.
- Strong customer focus and good team worker.
- Able to work on own initiative and organise, plan and project work without supervision.
- Good communication skills, both written and verbal.
- A team player with the ability to build relationships and work effectively with a wide range of people.

This role description is not intended to be exhaustive in every respect, but rather to clearly define the fundamental purpose, responsibilities and dimensions for the role. Therefore, this role description does not describe any individual role holder.

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In addition to the contents of this role description, employees are expected to undertake any and all other reasonable and related tasks allocated by line management.

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