



Portfolio and Planning Manager

Thanks for your interest in working at Citizens Advice. This document should give you everything you need to know about the above role.

Want to chat about this role?

Please contact the recruitment team at careers@citizensadvice.org.uk

The team

The role you're applying for is part of the newly forming Strategy and Transformation Directorate, which is being established to ensure that Citizens Advice has a clear strategic direction, can adapt to emerging opportunities and challenges, and delivers its strategy and services effectively.

The role sits within the new Portfolio, Planning, Performance and Risk (PPPR) Team under the Portfolio and Governance Department and will provide the important evidence that underpins the changes we need to make, partnering with the whole organisation. Over time we want to develop the Planning,

Performance, Portfolio and Risk capabilities together with and for the whole system - both the national organisation and the network of around 250 independent local Citizens Advice offices.



The role

The Portfolio and Planning Manager will develop a new 'portfolio' view of the organisation that will provide a range of ways of understanding better all the work we do and how that needs to change to better meet our day-to-day and longer term challenges.

This role is one of the three new connected roles in the new Portfolio, Planning, Performance and Risk (PPPR) team under the Portfolio and Governance Department:

- Portfolio and Planning Manager
- Performance Manager
- Risk Manager



Role profile

Job Title:	Portfolio and Planning Manager
Band:	Manager, Upper level
Reporting to:	Head of Portfolio, Planning, Performance and Risk (PPPR)
Proficient salary:	£58,570 plus £3,520 London allowance if applicable

Location:	Blended between office and home (England and Wales)	Travel H/M/L: M
Team overview:	<p>Oversee the delivery of effective Portfolio, Planning, Performance and Risk (PPPR) functions, ensuring</p> <ul style="list-style-type: none"> • establishment and maintenance of an effective portfolio view of the organisation. • development, adoption and delivery of an organisational business plan and high-level strategic plans, creating a clear sense of how we are implementing our strategy. • provision of a well-evidenced view of organisational and system-wide performance to help identify and support areas for improvement. • oversight and delivery of the risk and issues strategy. • establishment of the team within the broader Strategy and Transformation (S&T) directorate, adopting a business partnering approach with the wider national organisation and CA system. 	
Role purpose:	<p>Responsibility for Portfolio and Planning, with good general awareness of and ability to work across all PPPR areas:</p> <ul style="list-style-type: none"> • Lead the work on this area, developing, maintaining and improving policies and approaches. • Set up and lead cross-organisational teams to develop and refine processes and practice. • Provide evidence, insights and recommendations to leaders (managers, directors, executive team, trustees) to inform decision-making. • Communicate about the PPPR area to relevant stakeholders. • Develop and then maintain a system-wide (i.e. national and local Citizens Advice together) view of PPPR in line with our strategy. 	
Key accountabilities	Key elements/Tasks	% of Time
Lead responsibility for Portfolio and	<p>Portfolio</p> <ul style="list-style-type: none"> • Lead the development and maintenance of a portfolio view of all the 	70

Planning practices

organisation's main activities, with the ability to view and analyse this data in a variety of ways (cost, people, strategic alignment).

- Work with others to provide engaging visualisations of this data for a variety of audiences to support and provoke improved conversations and decision-making leading to reallocation of resources.
- Identify dependencies, linkages and risks across the portfolio.
- Develop ways of showing value and strategic alignment across the portfolio to inform prioritisation and sequencing of activity, and the distribution of resourcing.
- Work with other PPPR managers and the team to ensure good linkages across the portfolios.
- Analyse portfolio to reveal evidence of patterns; use this evidence to make recommendations that improve strategic alignment and better use of resources
- Formulate proposals and options for resource reallocation, producing and iterating these rapidly in response to Executive needs to improve performance, mitigate risks or respond to new radar insights. Develop capability to do this on monthly and quarterly cycles.
- Establish the portfolio as an up to date, reliable and objective source of truth, using robust data from sources across the organisation, regularly validating data and improving data quality
- Support analysis of risk across the portfolio.
- Support cross-organisational work and research e.g. colleague wellbeing, Equity, Diversity and Inclusion (EDI),

	<p>organisational development and culture, working with appropriate teams.</p> <ul style="list-style-type: none"> ● Secure the engagement of key stakeholders and their understanding of the portfolio and its use. ● Communicate to range of audiences using data and insights from the portfolio ● Extend the portfolio over time to give a system-wide view. <p>Planning</p> <ul style="list-style-type: none"> ● Lead the business planning process across the national organisation. ● Engage relevant stakeholders and secure buy-in to contributing to and making use of the portfolio ● Lead a business planning subcommittee or working group that co-designs aspects of the process and oversees its delivery ● Enable the organisation to move to a collective and energising exercise in alignment, able to iterate over short (monthly/quarterly replanning) and longer (3 - 5 years) periods. ● Design and redesign the business planning process with a range of internal stakeholders: Finance, Comms, EDI, People. ● Secure vital inputs and drivers, working with Strategy colleagues to gain clear strategy inputs, the Risk Manager for Risks, and Network-facing colleagues to appreciate the needs of the network of local Citizens Advice. ● Report and present to the Executive team, Trustees and senior managers; stakeholder engagement and management. ● Curate, produce and support communications of an annual organisational Business Plan or similar 	
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	<p>(this may in future become a system-wide plan, or a medium term plan).</p> <ul style="list-style-type: none"> ● Appreciate best practice in the relevant area and the most effective way of applying theory to practice in the national charity, and increasingly across the system of the national organisation together with local Citizens Advice. ● Work closely with key teams: Finance, Governance, Data, Strategy & Systems Change, People; adopt a business partnering approach alongside colleagues in the wider S&T directorate. ● Apply change management approaches and appreciation of culture to introduce and embed changes to approaches and processes. Work to build a culture that aligns to and support the work of the team and wider Strategy & Transformation directorate. ● Support development of the wider Strategy and Transformation directorate. ● Lead and contribute to research, reviews and retrospectives to enhance future delivery. ● Manage work to meet formal reporting timetables and processes, appreciating the sequencing of engagement and communication before, during and after committees and other meetings. ● Deputise for Head of PPPR as required. ● Carry out functions and responsibilities of other PPPR roles during periods of staff vacancy or extended absence, and to meet operational requirements. 	
<p>Manage and develop staff and ensure the efficient working of the team</p>	<p>Lead and line manage a team of x2 0.5 FTE Data Analysts by:</p> <ul style="list-style-type: none"> ● Creating a positive working environment in which equity, diversity, and inclusion are well managed and staff can do their 	<p>10</p>

	<p>best.</p> <ul style="list-style-type: none"> • Planning and allocating work, monitoring achievement of deadlines, and supporting staff as appropriate. • Managing performance and development through the PDR (Performance Development Review) process. 	
Financial management	<ul style="list-style-type: none"> • Undertake tasks from time to time for devolved budgets, participating in finance processes and operating the organisation's financial systems 	5
Contribute to team development	<ul style="list-style-type: none"> • Be an active member of the team, identifying opportunities for own and team development. • Contribute to the good and efficient working of the team in delivering against the business plan. • Build effective and collaborative relationships with colleagues. • Comply with Citizens Advice policies and procedures, including health and safety • Contribute to a positive team culture and Citizens Advice equality and diversity objectives. 	10
Other	<ul style="list-style-type: none"> • Undertake any other duties as may be reasonably required within the scope of the role. • Carry out tasks of other Manager team members in the area of Performance and Risk as operationally required. 	5



Person specification

Essential Criteria

First four criteria to be assessed at application stage

1. Significant experience of working in a large complex organisation effectively delivering, developing and embedding Portfolio and/or Planning practices;
2. Strong analytical skills and judgement, with ability to handle large quantities and different types of data, weigh options, and present recommendations;
3. Experience of working effectively at executive and board level, with the senior leadership cadre and people from a range of disciplines and levels in an organisation;
4. Experience of achieving results through others: influencing and persuading, building and maintaining trust and effective relationships at all levels;
5. Effective communication skills using a range of media, including evidence-based written reports for decision-makers;
6. Proactive, organised and methodical, with an ability to resolve issues independently and work on own initiative with minimum supervision to tight deadlines.
7. Able to manage several activities at one time and to resolve conflicting priorities effectively and adapt to changing circumstances; collaborative team working aptitude and flexibility;

Desirable criteria

1. Experience of working in the charity sector, knowledge of the current environment for large charities in the UK;
2. Line management experience;
3. First or post-graduate degree in related subject;
4. Facilitation skills working with small and large groups of stakeholders.

Requirements for the role *(candidates will confirm at application stage and at interview)*

1. Ability to work unsocial hours occasionally and travel to attend key meetings across UK with overnight stays
2. Commitment to professional development
3. Ability to contribute to a Purpose-driven, People-focused, Collaborative and Transparent organisation/team culture.
4. Proven ability to use IT packages, including Google systems such as Google Docs, Google Sheets, Google Slides, email and maintenance of an electronic diary as well as the ability to use or learn other packages as necessary.
5. Understanding of, and commitment to, the aims and principles of Citizens Advice in which equality and diversity is embedded throughout.
6. Awareness that Citizens Advice clients are at the heart of everything we do.