Position Description

Position Title:	**Capital Portfolio Specialist**
Reports To:	Manager – Portfolio Management
Responsible For:	N/A
Group and Team:	Capital Portfolio – Portfolio Management
Children's Worker:	No
Delegations and Budget Responsibilities:	As per Delegations Register

Purpose

To provide integrated portfolio investment analysis, optimisation and decision support across Council's capital portfolio. To maintain reliable portfolio information, assess completed investment proposals, model funding and delivery scenarios and support prioritisation, balancing and sequencing. To strengthen portfolio standards, assurance, governance, reporting, benefits management and Portfolio, Programme and Project Management ("P3M") practice while remaining distinct from direct project delivery, financial control and ownership or approval of individual business cases.

Key Relationships

External to Council

- Clients/public.
- Community groups and organisations.
- Other local and regional authorities.
- Outside agencies including Government departments.
- Professional organisations.

Within Council

- Other team members in your Department/Group.
- Other Invercargill City Council employees.
- Elected Representatives.
- Executive Leadership Team.

Our Compass Values and Behaviours

Responsibility

Take ownership of decisions and outcomes, both collectively and individually.

- We willingly share our knowledge.
- We acknowledge our mistakes, work to resolve them and learn from them.
- We give and receive feedback in a constructive manner to resolve issues.
- We do our job with total commitment.

Above and Beyond

Take opportunities to go the extra mile.

- We take the initiative to improve our work practices to get the best result.
- We challenge ourselves and each other to make it better.
- We take pride in providing the best possible outcomes.
- We are ambassadors for our Council at all times.

Respect

Everyone is important, as are their views.

- We support and care for each other.
- We stop to listen, learn and understand.
- We communicate in an honest, up-front, and considerate manner.
- We maintain confidences and avoid hurtful gossip.

Positivity

Always look on the bright side of life.

- We are approachable, interested and friendly.
- We are open and receptive to change.
- We acknowledge and praise the efforts of others.
- We work together as a team to get the job done.

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What You Will Do *(provided as a guide only)*

Portfolio Pipeline, Investment Appraisal and Prioritisation

- Develop and maintain the consolidated capital investment pipeline, including investment status, cost, timing, dependencies, risks, benefits, capacity and decision readiness.
- Assess completed business cases for portfolio fit, affordability, strategic alignment, risk, benefits and investment readiness and identify gaps requiring resolution by sponsors or business case owners.
- Develop and maintain portfolio investment assessment and prioritisation criteria, incorporating health and safety considerations and specialist advice where required.
- Develop and maintain portfolio prioritisation, scenario modelling and sequencing analysis to identify investment trade-offs and make appropriate recommendations.
- Analyse affordability, delivery capacity, dependencies, constraints and multi-year capital and operating impacts using finance information.
- Provide evidence-based recommendations to support portfolio investment and funding decisions.

Portfolio Standards, Stage Gates and Assurance

- Develop and maintain P3M standards, templates, stage-gate requirements, portfolio controls and proportionate assurance approaches.
- Provide specialist quality assurance and guidance for business cases, governance information, portfolio reporting and stage-gate readiness.
- Identify and escalate material assurance findings, investment risks and areas where agreed standards are not met.

Portfolio Risk, Benefits and Performance

- Develop and maintain portfolio-level analysis of risks, issues, dependencies, delivery capacity, constraints, benefits and performance.
- Develop and maintain benefits management standards and reporting requirements and provide assurance over benefits information. Sponsors and business benefit owners remain accountable for benefits delivery.
- Identify emerging trends, cumulative exposure and portfolio impacts requiring governance attention.

Portfolio Reporting and Decision Support

- Develop and maintain portfolio dashboards, forecasts, performance analysis and decision-support information.
- Provide pipeline, prioritisation, affordability, sequencing, capacity and delivery-confidence evidence to support long-term plan and annual plan processes.
- Assess the portfolio impact of material changes and provide clear evidence-based advice to governance and delegated decision-makers.

Note: *Specific performance measures for this position will be discussed between you and your manager through the performance development plan process.*

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What You Will Bring

The below qualities, knowledge and skills are the key focus for this position and are used to assess an applicant's suitability for the role and the incumbent's performance in the position.

Education and Qualifications

Essential:

A relevant tertiary qualification in finance, commerce, economics, business, infrastructure, project, programme or portfolio management or equivalent relevant experience.

Desirable:

A recognised portfolio, programme or project management qualification or equivalent PMO-related qualification.

Training or experience in investment appraisal, financial analysis, business case development, assurance, governance or PMO methodologies and practices.

Knowledge, Skills and Experience

Essential:

At least seven years' experience in portfolio, programme or project management roles, ideally including portfolio analysis, investment appraisal, prioritisation or capital planning in a complex capital delivery environment.

Strong portfolio and P3M capability including investment analysis, prioritisation, standards, assurance and governance support.

Strong knowledge of portfolio reporting, governance, stage gates, quality controls, benefits management and investment decision support.

Ability to assess completed business cases and improve the quality and consistency of portfolio information and controls.

Clear communication and the ability to influence, coach and support stakeholders to apply agreed portfolio practices.

Strong analytical judgement, scenario modelling, multi-year financial and cash-flow analysis, presentation and reporting skills, with the ability to translate complex evidence into clear decision advice.

Strong digital capability including portfolio reporting, data analysis and visualisation tools.

Desirable:

Understanding of the New Zealand local government environment including Long-term Plan and Annual Plan processes.

Experience with infrastructure capital portfolios and portfolio reporting or data visualisation tools.

Understanding of delivery capacity, investment risk, benefits management and Health and Safety considerations in capital investment decisions.

Demonstrated commitment to the principles of the Treaty of Waitangi and an awareness of Māori perspectives and issues relevant to Māori.

Agreement

Employee

Name	*Sign*	*Date*

Manager

Name	*Sign*	*Date*

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Note: *From time to time it may be necessary to consider changes in the position description in response to the changing nature of the work environment, which includes technological and statutory change. Such changes may be considered as part of the performance development review process or as required.*

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What We All Do

Customer Commitment

Treat customers with respect – taking the time to listen, learn and understand.
Present a positive image of Council by ensuring an efficient, courteous and professional service to customers at all times.
Acknowledge problems and complaints, identifying and promptly acting on solutions.

Continuous Improvement

Evaluate and review work practices and processes within all areas of responsibility to ensure that they are effective and efficient and implement improvements where appropriate.
Identify and propose additional business or service opportunities that enhance Council's existing capabilities.

Health, Safety and Well-being

Promote a safe and sound working environment and a culture of safe and responsible behaviours and attitudes.
Adhere to Health, Safety and Well-being policies and procedures, enabling a safe and healthy work environment for all workers and members of the public.

Civil Defence Emergency Management

Assist Council in preparing for and responding to an emergency.
After establishing the safety of members of your household, you may be assigned duties to assist Council and/or Emergency Management Southland in an emergency.

Other Duties

Undertake duties from time to time that may be in addition to those outlined but which fall within your capabilities and experience.

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