



Candidate pack

Role: Portfolio & Planning Manager



British Heart
Foundation



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Appointment of Portfolio & Planning Manager

Dear Candidate,

Thank you for your interest in our role of Portfolio & Planning Manager at British Heart Foundation (BHF).

It is my privilege to lead the People & Organisational directorate team for one of the UK's largest charities and the nation's leading independent funder of heart and circulatory disease research.

British Heart Foundation is strong, highly effective and well respected nationally and internationally. Every day we turn to research for hope, which is funded solely by the generosity of our supporters. At BHF, we know the only way to get closer to a world free from the fear of heart and circulatory diseases is to invest in pioneering research that has the greatest potential to improve and save lives.

As Portfolio & Planning Manager you will be responsible for managing and maintaining the POD portfolio of projects, POD plan and relevant performance reporting that supports us in creating an outstanding People Experience at the BHF.


We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.

BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy, Igniting Change, which sets out a roadmap of the changes we want to see by 2025. Our growing commitment to equality and diversity spans across our organisation and we pride ourselves in being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Kerry Smith
Chief People Officer





"CPR and heart surgery saved my life when I was six. Research made that happen." - Jady Briggs

About British Heart Foundation

For more than 60 years, British Heart Foundation has been at the forefront of cutting-edge research that has saved and improved millions of lives. But, despite this progress, our work is needed more than ever today. Over 7 million people are living with heart and circulatory diseases in the UK - that's our parents, grandparents, children and siblings. Heart and circulatory conditions remain the biggest killers globally.

We raise money to fund research that helps to save and improve lives, and to support people affected by heart and circulatory diseases. These diseases can affect anyone.

For over 60 years we've been a leading independent funder of research into heart and circulatory diseases. We are the UK's largest charity retailer with around 700 stores, an employee base of over 4,000, supported by a further 18,000 volunteers.

Our lifesaving work is primarily advanced through long-term investment in medical research. We have £437 million of BHF-funded research underway, with an aspiration to invest in excess of £1 billion in research over the next ten years.

We have so much to be proud of. But we know we're just scratching the surface of our true potential. And the challenges we face are as grave as ever.

There is nothing more precious than our hearts. But the tragic reality is that millions of people's hearts are at risk. Mounting numbers of people face an agonising wait for care, while many more live in hope of treatments and cures that could save or improve their lives.

At the same time, we stand at the precipice of revolutionary scientific advances. From unleashing the power of artificial intelligence (AI) and Data Science which could stop heart attacks and strokes, to finding revolutionary gene editing cures to end sudden cardiac death.

We need more support. By joining British Heart Foundation, you could help us bring hope to people living with heart and circulatory diseases in the UK.



Being a responsible charity

We've become a more socially, environmentally and financially sustainable organisation.

Our core purpose is to save and improve the lives of people affected by heart and circulatory diseases. We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

Climate change, environmental sustainability and social inequality are some of the critical challenges of our time and are clearly highlighted in the UN's Sustainable Development Goals. Our own health is dependent on the planet we inhabit, and the way societies are structured, which are often unfair and unequal on its people. We recognise our responsibility and the important role we play in tackling these issues.

Our strategy to 2030 highlights our commitment to being a healthy and inclusive place to work and a leading force for good in society. We are proud of our progress in the area. Our retail activities contribute significantly to the UK's economy and communities. Our EDI 'Igniting Change' strategy demonstrates

our commitment to improving equality, diversity and inclusion in all areas of our work, and we have programmes underway to reduce the environmental impact in many areas – from our transport to our supply chains. But we want and need to do more.

In response to soaring energy costs, we formed an Energy Efficiency Task Force and launched an energy awareness campaign, You Have the Power, to share energy saving information with BHF colleagues and volunteers.

Overall we were able to reduce our consumption by 10% over 2022-23. We will continue to explore energy efficiency improvements and to give our staff and volunteers more power to reduce energy consumption while providing a safe and comfortable working environment.

Funding animal research is not a decision we take lightly. You can read more relating to our commitments in research [here](#).

Our strategy to 2030

Inspiring support, accelerating breakthroughs,
saving lives.

BHF has never been more needed.
But we're poised and ready to meet this
moment.

Our strategy is a commitment to
helping achieve this vision, and sets
out the objectives and activities we will
prioritise in the years ahead.



Connecting the dots in research

Research requires connections – and bold initiatives. We committed £116m of new funding to research in 2022/23, including a once-in-a-generation £30m research grant to CureHeart. This global team of pioneering researchers seeks the world's first cures for inherited heart muscle diseases. This demonstrates how much can be achieved when brilliant people come together.

Our commitment to funding lifesaving research has grown thanks to significant income recovery from retail, fundraising and legacies

But BHF has never been more needed. We're poised and ready to meet this moment. As a BHF team, we have everything we need united behind a shared vision. We will continue to fund world-class research to save and improve lives.

We will focus on:

- Helping the cardiovascular research ecosystem recover and grow.
- Progressing our ambitions around equality, diversity and inclusion in cardiovascular research.
- Enhancing knowledge of cardiovascular diseases.
- Implementing partnership initiatives to address unmet need e.g. with the UK Dementia Research Institute, Medical Research Council (MRC) and Innovate UK.
- Seeing more BHF-funded research discoveries being translated into patient and public benefit.
- Developing a research translation strategy, to increase the commercial exposure and translation of BHF-funded research towards patient benefit.

We want
more people to
survive a heart
attack

5

Every five minutes someone
is admitted to a UK hospital
due to a heart attack



Heart health matters

More than seven million people live with heart and circulatory diseases in the UK today. Millions more have risk factors for these conditions, such as high blood pressure, raised cholesterol, and type 2 diabetes. Given the immense scale of this public health challenge, what can we do to ensure that everyone has access to the personalised, optimised, prioritised care they need?

Our analysis into the impact of the pandemic shows that the cardiovascular workforce is one of the most important factors affecting patient care and something heart patients want to see addressed.

Our continued focus to promote information and provide support to heart and circulatory disease patients will be accelerated by:

- Increasing people's chances of surviving out-of-hospital cardiac arrest (OHCA).
- Scaling RevivR (our accessible, digital CPR training product) to engage with different audiences.
- Helping more people to manage their cardiovascular condition.
- Ensure BHF is meeting patient requirements at key points of need with our information and support offer.
- Supporting people to reduce their risk of cardiovascular disease.
- Targeting policy development and influencing, particularly in relation to hypertension, obesity and the NHS workforce.

We want

everyone to know
their numbers

5

As many as 5 million people
are living with undiagnosed
high blood pressure in the UK



Our mighty network of support

Our amazing fundraisers, shoppers and supporters are the beating heart of everything we do. Their passion, determination, and belief in our mission make lifesaving breakthroughs possible. And even during the toughest times, faced with a myriad of economic challenges, our supporters continue to run, swim, cycle, shop and rally together for people affected by heart and circulatory diseases.

Thanks to the phenomenal efforts of our staff, volunteers, partners and our supporters, we generated an incredible £144m net income over 2022-23 to power our lifesaving work. Our razor-sharp focus to work in partnership and accelerate fundraising in a bid to save even more lives has never been more crucial.

We will continue to focus our attention on raising awareness of our mission and raising funds to power our lifesaving science by:

- **Generating more fundraising income, with an increased proportion from high value audiences.**
- **Focussing on integrated moments to drive income and greater consideration to donate.**
- **Generating more income from our commercial operations, with an increased proportion from online retail.**
- **Continue our new shop and store opening programme.**
- **Ensuring our supporters have an outstanding experience.**
- **Improving our understanding of supporters and personalising our offer through smarter marketing technology.**

We want
to tackle vascular
dementia

13,000

Vascular dementia causes more than 13,000 deaths each year in the UK. People with a family history of coronary heart disease are significantly more likely to develop vascular dementia

United together in our mission

We want BHF to be a safe, healthy, and inclusive workplace.

Our EDI strategy, Igniting Change, is a commitment to embed equality, diversity and inclusion into everything we do. We want to create an environment where everyone who works with us can succeed, regardless of their background. One of the ways we do this is by developing an open and inclusive culture.

We are clear about our direction and what we need to achieve. We are Team BHF, we have a shared goal, supported by streamlined processes, a culture of continuous improvement and living our BHF values through everything we do. We're stronger working together.

We can inspire support, accelerate breakthroughs and save lives, when we work together. Team BHF is united in our shared vision and we'll continue to focus on these key areas that will help drive our performance forward by:

- **Delivering an outstanding people experience.**
- **Planning strategically for the skills, capabilities and talent BHF needs to thrive in the future.**
- **Accelerating our digital and technology transformation.**
- **Embedding solid technology foundations, delivering greater interconnectivity between teams, increased pace and improved customer engagement and satisfaction.**
- **Continuing to increase our social, environmental, and financial sustainability.**





Team BHF attending
Birmingham Pride 2023

Equality, diversity & inclusion

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

Reducing heart and circulatory disease health inequalities is an important part of our strategy to 2030. The ongoing work of Kaleidoscope, our equality, diversity and inclusion group, as well as our Research Inequalities Working Group, demonstrate our commitments to improve equality, diversity and inclusion for our staff, our volunteers, and our funding activities. We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy, Igniting Change, sets out our roadmap of the changes we want to see by 2025.

Our Kaleidoscope group is made up of representatives from across the organisation. Our activities encompass accessibility to work and progression for those with care responsibilities, working parents, those with disabilities and long term health conditions, different age groups, those from underrepresented ethnic backgrounds, LGBTQ+ individuals and many more forms of diversity, visible and invisible.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQ+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

Whilst working for BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day.

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.

Building an inclusive and supportive environment

Many heart and circulatory diseases are diseases of inequality. Our equality, diversity and inclusion (EDI) strategy, Igniting Change, recognises that everyone's circumstances are unique. We are committed to funding lifesaving research for everyone, and we are committed to being an inclusive employer.

Whilst working at BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day

Improving diversity in research

Making the world a fairer place is an important goal, one that we are proud to contribute to by tackling inequalities in cardiovascular health, improving the diversity of our research workforce, and making BHF a more inclusive place to work.

We want to have achieved greater inclusivity in the funding and the design of research, as well as in the cardiovascular research community. We have focused on collating data that defines our starting point, so we can take the right action to improve diversity.

We've published our first research funding diversity report. The report provided valuable insight that is helping us shape our future actions to address under-representation in our research community.

Staff engagement

Listening to our colleagues, and understanding what matters, is always the first step in improving the employee experience.

Our highest scoring areas in the latest colleague engagement survey were goal setting, fair treatment, responding appropriately to instances of discrimination and that BHF has created an environment where people of diverse backgrounds can succeed.

Heartfest

In June 2022 we held our first ever Heartfest, an online festival that brought BHF colleagues together to celebrate our work and give everyone a chance to reconnect with each other and to our cause.

Heartfest has since been a yearly event, growing each year and incorporating both online and in person events at BHF offices and shops across the UK.

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQ+ community. BHF colleagues have taken part in Pride events across the country since 2018, including Pride marches in Edinburgh, Cardiff, Belfast and London.

These are our values

We are proud that the work we do is funding groundbreaking, lifesaving research that one day could see a world free from the fear of heart and circulatory diseases, including conditions such as heart attacks, stroke and vascular dementia.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the science that keeps millions of hearts beating.



We're brave

We speak out. We're decisive. We're innovative.



We're compassionate

We're open and honest. We respect others. We care.



We're informed

We're clear. We're open minded. We're work together.



We're driven

We're focused. We're determined. We keep learning.



Our benefits

We all achieve more together when we're happy and healthy

As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here.

Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Healthcare

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family leave

We offer 12-weeks' pay package for all family leave including maternity, paternity and adoption leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring responsibilities, bereavement, and specialised medical appointments.



Pension

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.



Job specification

Job description

Job title	Portfolio & Planning Manager		
Directorate	People & Organisational Development		
Team	Talent & Organisational Development		
Reporting to	Head of Organisational Change	No. of direct reports	0
Agility contract type	Blended (London office & home)		
Location	Dual - Home & Greater London House, London NW1 7AW		
Budgetary responsibility	N/A		
Job level	4	Date	June 2024

Role summary

As Portfolio & Planning Manager for the BHF's People & Organisational Development (POD) Directorate, you will be responsible for managing and maintaining the POD portfolio of projects, POD plan and relevant performance reporting that supports us in creating an outstanding People Experience at the BHF.

This role is a key part in helping us to understand our performance and impact, and ensure we are investing scarce resources in the right initiatives to improve our performance, and ultimately supporting the delivery of the BHF's strategy to 2030.

You will report into the Head of Organisational Change but will also be accountable to the Senior Leadership Team of the POD Directorate and work with colleagues across POD. You will work closely with colleagues outside of the directorate too, working with the EPMO and key portfolio, planning & performance colleagues elsewhere in the BHF – as well as with teams that help us realise objectives within POD, such as Technology and Finance colleagues.

Your contribution will be a key part in helping POD run smoothly and effectively. You will prioritise, plan and coordinate change and improvement activity, based on evidence and insight, and allocate resource and focus appropriately. You'll understand and report on progress in an effective way, both at a strategic and operational level.



Key responsibilities

Planning & Portfolio Management

- In line with the BHF's Enterprise Portfolio Management Office (EPMO), maintaining the POD portfolio view of inflight programmes and projects, tracking all programmes of activity within and related to the POD directorate (including aims and objectives, expected benefits, key milestones, timelines, key dependencies, risks and issues, RACI matrix etc.)
- Maintaining the POD Portfolio Management Office, and supporting the portfolio's regular review, refocus and planning
- Facilitating the BHF's annual and quarterly planning cycles within POD, in close collaboration with cross-directorate colleagues, including helping align financial budgeting with planned activity
- Creating and facilitating workshops and sessions with the POD Leadership Team and POD Leadership Community in relation to planning, performance and resourcing activities
- Working collaboratively to anticipate, communicate and support the management of key operational and cross-organisational risks
- Representing and influencing on behalf of POD in relevant cross-organisational planning and performance forums
- Being a central point of contact and representing the POD directorate internally, ensuring other directorates are updated and briefed as appropriate – this includes ensuring POD's senior management team has full visibility across the portfolio to minimise the risk of siloed activity
- Building strong working relationships with key colleagues in other directorates to maintain oversight of and report on aligned or dependent activity, as well as cross-directorate initiatives
- Tracking capacity and supporting decision making on resource allocation within POD, through development of an "Air Traffic Control" approach
- Being an active member of the BHF's Portfolio Management community, representing the POD directorate on the Transformation Steer Co, helping to solve issues around cross-BHF capacity and resource allocation, and briefing members of the Operations Board where required
- With the support of the BHF's Continuous Improvement (CI) team, help the POD Senior Leadership Team identify opportunities for CI to be embedded into POD plans, potential CI projects and to track progress of CI projects within the POD portfolio
- Support as required on improving our POD processes, in particular relating to the POD portfolio, planning and performance



Key responsibilities cont.

Governance

- Continuing the establishment and co-ordination of a POD Portfolio Group, to ensure strong portfolio governance within the POD directorate and wider BHF, as well as supporting the running of other relevant governance meetings; working with POD project managers and reporting to the POD Leadership Team; reporting on and challenging progress of ongoing activity; and helping to support rigorous decision-making around the initiation of new activity
- Aiding the production of ad-hoc reports and progress updates to the BHF's major governance forums, such as our Board of Trustees, Audit & Risk Committee, Remuneration & People Committee, Executive Group and Operations Board, attending the latter to update on the POD portfolio as required
- Responsible for maintaining the POD roadmap, supporting POD leadership to plan and work within timescales
- Oversee and support use of portfolio, programme and project management systems within the POD Directorate, supporting project managers and colleagues to input required information, to produce reports on progress for different governance bodies

Performance & Impact

- Reporting on progress against POD's strategic and operational objectives, using the POD performance management framework, and feeding into all levels of organisational performance and impact reporting
- Identifying, coordinating and preparing the evidence and information required to support decision-making and prioritisation, both at an organisational and POD-level, to ensure the best outcomes to support our strategy
- Using external insights and trends to give context to internal information and support strategic decision-making
- Work with the POD Leadership Team to plan the insights needed from our engagement activities, in particular our colleague engagement survey, to align to our plans and strategy
- Working with Head of Internal Communications & Engagement, Data Analysts and others across POD to analyse and draw insights from our engagement data
- Connecting insights from our engagement data to other aspects of our performance and impact, to help drive delivery against our strategy



Key responsibilities cont.

Communication & Engagement

- Working with other teams across BHF to champion good practice in project/ programme management, performance management and Continuous Improvement across the directorate and wider BHF, and upskilling colleagues in relevant techniques and processes
- Upskilling those within POD with project management responsibilities, including training as needed
- Supporting the communication of the POD portfolio, our performance and impact to the wider POD Directorate and colleagues across BHF



Person specification

Knowledge, training and qualifications

Essential

- Knowledge and experience of project, management, portfolio management and business planning (may include a qualification or similar)
- Good understanding of frameworks for performance reporting (may include a qualification or similar)

Desirable

- Knowledge of people/HR functions of medium to large organisations
- Knowledge of risk management

Experience

Essential

- Proven experience as a PMO/portfolio manager/planning & performance manager or similar role in a complex, multi-faceted organisation
- Experience supporting strategic planning and prioritisation with multiple interdependencies
- Experience devising monitoring frameworks, and tracking and reporting on progress against programme aims and wider organisational strategy

Desirable

- Experience developing portfolio management and reporting systems
- Experience managing strategic boards and senior-level meetings
- Experience of working within a People function and managing a People Change portfolio
- Experience of upskilling others

Skills and attributes

- Highly organised, with solid project and time management
 - A quick learner, able to get up to speed with a complex organisation quickly
 - Analytical, data driven and insight led
 - Capable of synthesising clear and visually compelling reporting outputs, and presenting them to senior colleagues
 - Comfortable asking probing questions, and confident challenging decisions and activity based on agreed performance criteria, including at a senior level
 - Highly collaborative, with an ability to build relationships, inspire trust, and upskill and influence others to engage in programme management and performance monitoring
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Person specification cont.

Skills and attributes

- Flexible and agile in approach, able to adapt to the needs of different teams within the POD directorate and wider BHF
- Innovative thinker, always looking for better ways of achieving objectives
- Excellent knowledge of Microsoft Office suite
- Willingness to experiment with AI tools, and use them to increase productivity and efficiency

Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.

Data protection

During your employment this role will not encounter any personal data



How to apply

To apply for this role please use the apply button via the jobs page on our website. Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification.

All applications are managed by our Recruitment team. If you wish to speak with a member of the team regarding the role and your application please contact them on careers@bhf.org.uk

Early application is encouraged as we will review applications throughout the advertising period and reserve the right to close the advert early should we receive a sufficient number of applications.

Should you need any adjustments to the recruitment process at application stage please contact the Recruitment team on careers@bhf.org.uk



**British Heart
Foundation**