

Tūranga Mahi / Position Description: Portfolio Analyst

Nāu te rourou, nāku te rourou ka ora ai te iwi
With your basket of knowledge, and my basket of knowledge, all will be well

Rotorua Lakes Council is one of the largest employers in Rotorua, building a positive future for our district with approximately 70,000 residents, and visitors numbering in the millions. We are determined to be among the best councils in New Zealand and are committed to continually improve the service provided to our customers, both external and internal.

Our people are central to achieving Council's Priorities and providing high quality community services that offer best value for money. And we are committed to building a high performing culture based on our **core values** of being *innovative, helpful, respectful, engaging and inspiring*. In addition to our values, there are **core competencies** required of all Council staff, being:

- **Performance Orientation:** A high performer consistently delivering performance outcomes
- **Solutions Focused:** Committed to customer-centred continuous improvement
- **Teamwork:** Contributes effectively within a team providing leadership where appropriate
- **Relationships:** Well-developed interpersonal, and relationship engagement and management skills
- **Collaboration:** Works collaboratively across teams and functions within a matrix organisation
- **Accountability:** Willingly takes accountability and engage in problem solving
- **Te Ao Maori:** Proficiency in te reo Māori me ōna tikanga appropriate to their role¹.

Rotorua is in the heart of the Te Arawa region. 40% of the population are Māori. Being a bicultural city provides a foundation for us to recognise and celebrate our increasing diversity which enriches us as individuals and as a multi-cultural community.

Our top priority is to ensure the health, safety and wellbeing of our people at work. We want you to go home healthy and safe each day. Safety is everyone's job – all of our staff have a shared responsibility to manage our work environments to prevent harm, and to actively engage with health and safety initiatives and procedures. Managers are responsible for the health, safety and wellbeing of the areas and people under their leadership.

Rotorua Lakes Council has statutory responsibility for Civil Defence and Emergency Management (CDEM) within the District. This responsibility extends to all staff, who may be called upon to undertake CDEM roles in addition to their position specific responsibilities.

We are one team. To be successful, it is important that all staff are aligned to and actively support the organisation's direction, working collaboratively, and actively participating in activities and initiatives to advance the organisation e.g. activities to build bicultural capability, improve health and safety, or promote diversity.

The following pages provide the requirements of your specific position. In addition to these, you are also expected to be proactive in knowing and following Council policies and procedures.

TE ĀHUA O TE MAHI - POSITION SPECIFICATION

¹ This is informed by our Bicultural Competency Framework, and staff are actively supported in gaining competency.

MAHI - POSITION:	Portfolio Analyst
RANGATIRA - REPORTS TO:	Capital Portfolio Performance Lead
KĀHUI - GROUP:	Organisational Performance and Innovation
TAUNGA MAHI - LOCATION:	Civic Centre
PŪTAKE - POSITION PURPOSE:	To enable high-quality, data driven portfolio oversight by supporting the performance management, reporting, and optimisation of Rotorua Lakes Council's capital project portfolio. The Portfolio Analyst is a critical analytical and coordination role that supports decision making, identifies trends and risks, and helps align capital investment with Council's strategic objectives. The role ensures visibility of programme performance across the lifecycle, supports PLM system maturity, and enables continuous improvement through evidence-based insights. The Portfolio Analyst also plays a key role in supporting the broader Capital Delivery Team through the development and delivery of structured reporting, dashboard visualisation, and administrative coordination where needed.
NGĀ WHAKARITENGA - DELEGATIONS	Financial Delegation: None Direct Reports: None Delegated Authority: Operates under the direction of the Capital Portfolio Performance Lead. Supports the integrity of reporting outputs, risk analysis, and PLM data.
HONONGA WAIWAI – KEY RELATIONSHIPS: Rāroto - Internal	<ul style="list-style-type: none"> • Mayor and Elected Members • Te Tatau o te Arawa • CE's Group • Manahautū Te Arawa Partnership • Destination Development • Organisational Performance & Innovation • Infrastructure & Assets • Chief Financial Officer • People & Culture • Community Experience
HONONGA WAIWAI – KEY RELATIONSHIPS: Rāwaho - External	<ul style="list-style-type: none"> • Council stakeholders • Contracted service providers • Technical professionals in your field • Consultants and Contractors • Auditors • Local Iwi groups • Neighbouring local authorities • Mayor and Elected Counsellors • Local Government New Zealand (LGNZ) • Media and professional groups • Regional Council • Chamber of Commerce • Te Arawa Entities • Rotorua Community & Partnership • Police • Māori Wardens • Neighbourhood support

**NGĀ MAHI MATUA -
KEY
ACCOUNTABILITIES:**

1. Portfolio Analysis and Optimisation

- Monitor and evaluate the performance of the capital project portfolio using structured reporting tools and scenario analysis.
- Identify delivery risks, resource bottlenecks, and opportunities for improvement across projects and programmes.
- Contribute to investment prioritisation processes and portfolio balancing.

2. Reporting and Insights

- Develop and maintain performance dashboards using Power BI, PLM, SharePoint and Excel.
- Create and maintain reporting outputs on internal SharePoint-based platforms to support easy access and visibility for stakeholders.
- Prepare high quality reports for executive and elected member audiences.
- Provide forward looking insights to support strategic and operational decision making.

3. Risk and Benefit Management

- Support enterprise and programme level risk analysis.
- Track benefits realisation and alignment of projects to Council outcomes.
- Monitor variance across financial, schedule, and scope dimensions.

4. Data Quality and System Support

- Ensure data integrity across project records within the PLM platform.
- Work with project teams to improve consistency and use of reporting tools.
- Support system configuration, process mapping, and continuous improvement.

5. Stakeholder Engagement and Team Support

- Liaise with Programme Managers, Finance Business Partners, Project Managers, and Governance teams to ensure cohesive planning and reporting.
- Provide ongoing support to the broader Capital Delivery Team including report development, data coordination, and delivery of system-based tools.
- Assist with ad hoc analysis, dashboard enhancements, and reporting administration as needed.

TE ĀHUA O TE TANGATA - PERSON SPECIFICATION

<p>NGĀ MAHI MATUA - FORMAL QUALIFICATIONS: (Ngā matau ā-wheako rānei - Or experience recognised as equivalent)</p>	<p>Required</p> <ul style="list-style-type: none"> • Bachelors degree in business, IT, data analytics, project management, or a related field. • 5+ years experience in a project, programme, or portfolio support or analysis role within a complex delivery environment. • Strong data collection, analysis, and interpretation skills, with the ability to generate insights that inform decision-making. • High proficiency in Microsoft Excel and Power BI, with demonstrated experience in developing dashboards and structured reporting outputs. • Excellent written communication skills, with the ability to prepare professional reports and presentations. <p>Preferred</p> <ul style="list-style-type: none"> • Familiarity with ERP systems such as TechOne, including the use of digital tools for project and portfolio reporting. • Experience working with SharePoint based reporting environments and Microsoft Power Apps to support automation and workflow tools. • Understanding of financial systems and capital planning processes. • Certification in project, programme, or portfolio management methodologies (e.g. PRINCE2, MSP, MoP). • Experience working in or with public sector organisations or regulated capital delivery environments.
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<p>NGĀ PŪKENGA - POSITION SPECIFIC COMPETENCIES AND ATTRIBUTES</p>	<ul style="list-style-type: none"> • Demonstrates advanced analytical and critical thinking skills, with the ability to identify trends, synthesise information, and translate data into actionable insights. • Shows strong commercial and financial acumen, particularly in relation to portfolio balancing, investment logic, and long-term planning. • Communicates technical and complex information clearly and confidently to a range of audiences, including executive and governance stakeholders. • Demonstrates an understanding of project, programme, and portfolio management frameworks and their practical application in a capital delivery context. • Applies a continuous improvement mindset, identifying opportunities to enhance reporting processes, systems usage, and performance insights. • Collaborates effectively across multidisciplinary teams, supporting delivery, finance, and planning functions with relevant and timely information. • Maintains a proactive and responsive approach in a fast-paced, deadline-driven environment, balancing competing priorities effectively. • Brings a high standard of attention to detail, accuracy, and professionalism in all outputs and interactions. • Values and promotes the principles of public service, accountability, and transparency. • Demonstrates cultural awareness and a commitment to working effectively within a bicultural and inclusive organisational environment.
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<p>NGĀ UARATANGA - VALUES:</p>	<p style="text-align: center;">Tatou Tatou – We Together Kotahi Tatou – One Community – One Team</p> <p>WHY WE DO IT..... We believe in empowering our people and providing them with the tools to create value and make a positive difference in their lives and the lives of others</p> <p>HOW WE DO IT..... We do this by working in partnership, making it simple and solutions focused</p> <p>WHAT WE DO..... We provide quality services for our community and people to prosper</p> <p>OUR CORE VALUES – PEOPLE FIRST</p> <p>RESPECTFUL: Integrity, Listening, Pride, Honesty, Empathy, Understanding, Considerate</p> <p>HELPFUL: Approachable, Supportive, Collaborate, Go the extra mile, Proactive, Friendly, Caring, Guiding</p> <p>ENGAGING: Communication, Connectivity, Partnership, Working Together, Inclusive, Supportive, Responsive</p> <p>INSPIRING: Make a difference, Motivated, Take people with you, Encourage, Have pride in your work, Be proactive, Energised</p> <p>INNOVATIVE: Find solutions, Progressive, Continuous improvement, Empowered</p> <p>BICULTURAL: Willingness to learn and understand the Māori worldview, consideration, leading by example, sharing experiences</p>
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