

*Position Description*

Head of Enterprise Portfolio Management

*Location:* Palmerston North or Wellington

*Reporting to:* Chief Strategy and Enablement Officer

*Business Unit:* Strategy and Enablement

*Direct Reports:* Enterprise Portfolio Manager, Enterprise Business Analyst, Enterprise Value Analyst

*Date Last Reviewed:* February 2025

### *About FMG*

***Formed by farmers for farmers over a century ago, FMG is New Zealand’s leading rural insurer providing risk advice and insurance solutions for farmers, growers, commercial businesses, the lifestyle sector and domestic clients.***

***We’re proudly 100% New Zealand owned and operated, and our focus is on helping our clients to achieve their goals.  As a mutual organisation, we’re all about giving rural New Zealanders a better deal, and part of this involves reinvesting all profits back into the business to keep premiums low and ensure the future sustainability of the organisation.***

### *FMG’s Values*

The FMG brand represents promises about what customers can expect from us and each of us is responsible for delivering on these promises. Living our company values means we deliver the best brand experience for our customers. Our company values are:

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| * Do what's right - Whāia te ara tika | * Make it happen - Whakatutukitia |
| * We're in it together - Ko tātau tātau | * Proud of who we are - Whakahīhī i te whakapapa |

### *Work Environment*

We strive to provide an environment that promotes and fosters achievement. We place importance on career development and training to give our people the tools they need to succeed.

FMG’s Head Office is located in Wellington and accommodates FMG’s Executive Leadership Team (ELT), Client Propositions & Online Services, People & Culture and Communications, Financial Management, Product & Pricing and Underwriting, Reinsurance, Business Information and Analysis, Legal and Compliance.

FMG’s largest regional office is located in Palmerston North accommodating our National Sales & Advice Centre, Information Technology, Claims, Operations and Payments functions. In addition to the offices in Wellington, Palmerston North and Christchurch FMG has offices in 30 regional locations throughout New Zealand.

The Strategy and Enablement team culture is based on open and honest communication, where authority and accountability are clear. Both challenges and opportunities are shared to bring about delivering the best strategy for FMG.

### *Purpose of the role*

The Head of Enterprise Portfolio Management role is to ensure that FMG delivers to its strategic ambition as outlined in Te Ara Tika, by helping to drive the design of strategic decisions at a Pillar and Enterprise level through Quarterly Business Prioritisation (QBP) forum and ensure effective enterprise risk management through Enterprise Portfolio Management Committee (EPMC). This role involves leading a team, working closely with stakeholders across the organisation, and championing a value-focused culture.

As a member of the Strategy and Enablement leadership team you will be responsible to collectively develop FMG’s strategy and deliver the Business Plan and provide visible leadership. Establishing effective relationships with FMG’s Strategic and Mutual leadership is central to the role.

### *Key Responsibilities*

| Area | Responsibilities |
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| Portfolio Management | * Engages and influences senior managers to ensure the portfolio will deliver the agreed business objectives. * Leads the definition of a portfolio of programmes, projects, and/or on-going service provision. * Plans, schedules, monitors and reports on portfolio-related activities. * Drives appropriate forums including QBP and EPMC * Ensures that each part of the portfolio contributes to the overall achievement of the portfolio. * Identifies portfolio-related issues. * Notifies projects/programmes/change initiatives of issues and recommends and monitors corrective action. * Collects, summarises and reports on portfolio measures. * Reports on portfolio status as appropriate. |
| Stakeholder Relationship Management | *Influencing stakeholder attitudes, decisions, and actions for mutual benefit.*   * Leads the development of comprehensive stakeholder management strategies and plans. * Builds long-term, strategic relationships with senior stakeholders (internal and external). * Facilitates the engagement of stakeholders in support of the delivery of services and change projects. * Acts as a single point of contact for senior stakeholders, facilitating relationships between them. * Negotiates to ensure that stakeholders understand and agree on what will meet their needs, and that appropriate agreements are defined. * Oversees monitoring of relationships including lessons learned and appropriate feedback. * Leads actions to improve relations and open communications with and between stakeholders. |
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| Portfolio Capability | *Improving the way FMG makes decisions regarding investments including*   * Steering effective decisioning processes with Projects * Ensuring high standards with documentation * Ensuring engagement with key stakeholders * Ensuring ongoing development of capability |
| Performance Management | *Improving organisational performance by developing the performance of individuals and workgroups to meet agreed objectives with measurable results.*   * Forms, maintains and leads workgroups and individuals to achieve organisational objectives. * Determines and delegates objectives and task responsibilities to individuals or teams - including people management responsibilities as appropriate. * Sets the quality, performance and capability targets in line with organisational goals. * Monitors performance and working relationships and provides effective feedback to address individual issues. * Encourages individual development of skills and capabilities in line with team and personal goals. * Facilitates the development of individuals by adjusting workload, targets, and team capacity. * Plays an active role in formal organisational processes such recruitment, reward, promotion and disciplinary procedures. |
| Professional Development | *Facilitating the professional development of individuals in line with their career goals and organisational requirements.*   * Determines development needs for a professional practice area. * Aligns development activities with organisational priorities, learning and development strategies and career pathways. * Assists practitioners with the creation of development plans. * Advises and supports assigned practitioners, ensuring alignment with professional development plans and career opportunities. * Ensures that practitioners record evidence of continuing professional development. * May contribute to practitioners' performance appraisals. |
| Investment and Benefit Management | * Develops organisational policies, standards, and guidelines for investment appraisals. * Leads activities to establish consistent appraisal across the component projects and programmes within a portfolio. * Reviews investment appraisals for high-value initiatives to assure their quality. * Leads investment appraisal activities for complex programmes of work and portfolios. |
| FMG Values | * To promote the “FMG Way” through displaying the values of FMG which are: do what’s right; make it happen; we’re in it together; and proud of who we are |
| Other Duties | * Complete tasks in agreed timeframe and provision of appropriate progress reports to the satisfaction of the CSO. * Undertake tasks as directed by the CSO from time to time. |
| Health & Safety | * Demonstrate commitment to workplace safety and wellbeing practices. * Promote and support initiatives that contribute to a healthy and safe working environment for employees, visitors and contractors. * Ensure compliance with safety and wellbeing policy and procedures, including accident and incident reporting and investigation, hazard management, induction, training and supervision, employee participation and contractor management. |

### *Levels of Responsibility*

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| Area | Responsibilities |
| Autonomy | * Has defined authority and accountability for actions and decisions within a significant area of work, including technical, financial and quality aspects. * Establishes organisational objectives and assigns responsibilities. |
| Influence | * Influences policy and strategy formation. * Initiates influential relationships with internal and external customers, suppliers and partners at senior management level, including industry leaders. * Leads on collaboration with a diverse range of stakeholders across competing objectives within the organisation. * Makes decisions which impact the achievement of organisational objectives and financial performance. |
| Complexity | * Contributes to the development and implementation of policy and strategy. * Performs highly complex work activities covering technical, financial and quality aspects. * Has deep expertise in own specialism(s) and an understanding of its impact on the broader business and wider customer / organisation. |
| Business Skills | * Demonstrates leadership in organisational management. * Understands and communicates industry developments, and the role and impact of technology. * Manages and mitigates organisational risk. * Balances the requirements of proposals with the broader needs of the organisation. * Promotes a learning and growth culture in their area of accountability. * Leads on compliance with relevant legislation and the need for services, products and working practices to provide equal access and equal opportunity to people with diverse abilities. * Identifies and endorses opportunities to adopt new technologies and digital services. * Creatively applies a wide range of innovative and / or management principles to realise business benefits aligned to the organisational strategy. * Communicates authoritatively at all levels across the organisation to both technical and non-technical audiences articulating business objectives. * Learning and professional development - takes the initiative to advance own skills and leads the development of skills required in their area of accountability. * Security, privacy and ethics - takes a leading role in promoting and ensuring appropriate working practices and culture throughout own area of accountability and collectively in the organisation. |
| Knowledge | * Has developed business knowledge of the activities and practices of own organisation and those of suppliers, partners, competitors and clients. * Promotes the application of generic and specific bodies of knowledge in own organisation. * Develops executive leadership skills and broadens and deepens their industry or business knowledge. |

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| **COMPETENCIES** | |
| *\*see competency framework for behaviours expected at each level* | *Expected Level* |
| **Customer Driven (Internal & External)**  A commitment to understanding the needs and best interests of both internal and external customers, in order to provide them with outstanding customer service and help them to make informed decisions. | Advanced\* |
| **Accountability**  Taking personal ownership of decisions, behaviour, and development, and being responsible for how these actions impact on the wider organisation and customers. | Advanced\* |
| **Adaptability**  Demonstrating a willingness to engage in a changing environment and being flexible and comfortable working with change. | Advanced\* |
| **Motivation and Drive**  The determination to achieve goals and strive for excellence. | Advanced\* |
| **Relationship Building**  Developing and maintaining positive, professional relationships that are built on mutual trust and respect. | Advanced\* |
| **Team Work**  Making a positive contribution to the FMG team and collaborating effectively with others to achieve objectives. | Advanced\* |
| **Critical Analysis**  The capability to identify key issues, trends, or important facts from information and to question and probe. | Advanced\* |
| **Motivating and Developing Others**  A commitment to getting the best out of people and motivating them to reach their full potential. | Advanced\* |
| **Change Leadership**  The drive to initiate opportunities to address FMG’s organisational needs and to communicate change in a way that gains buy-in and support from others. | Advanced\* |
| **Strategic Thinking**  The capacity to stand apart from the day-to-day and take a long-term, big picture view of the business. | Advanced\* |

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| **KNOWLEDGE** | |
| **Qualifications** | Relevant Tertiary Qualification essential |
| **Business Awareness** | Understands the internal workings of FMG and how business works; understands FMG's position in the advice and insurance market and knows the competition. |
| **Rural Knowledge** | Understands the rural community and keep up to date with the economic, political, and environmental issues affecting our customers. |
| **Risk/Insurance Knowledge** | Understands risk and how to apply FMG's policies to situations; is knowledgeable about compliance requirements; understands the insurance process and how claims are managed; knows industry partners and competitors. |

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| **SKILLS** | |
| **Written Communication Skills** | Able to write clear, concise and persuasive proposals and reports. |
| **Verbal Communications Skills** | Communicates clearly in order to present information to persuade and influence others. |
| **Listening Skills** | Demonstrates active listening skills through eye contact, paraphrasing, appropriate body language and checking understanding. |
| **Financial Skills** | Able to calculate and understand financial information e.g. profit & loss, forecasts. |
| **Risk Assessment Skills** | Identifies, understands and mitigates the risks that may impact on FMG's strategy, initiatives and reputation. |
| **Specialist Skills** | Project and programme management skills. |

### *Relationship*

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| External | Internal | Committees/Groups |
| * Suppliers * Contractors * Consultant Organisations | * Project Sponsors, Stakeholders, steering group members * Divisional/Regional/Senior Managers/Board * Pillar Leads and Pillar Owners | * Working Parties |

### *Financial Authority Levels*

* As per Delegated Financial Authority

### *Human Resources Authority Levels*

* May hire direct and indirect reports within approved FTE headcounts.
* May discipline direct and indirect reports in consultation with manager and Human Resources.
* No authority to dismiss staff, unless delegated by the Chief Executive and in consultation with manager and Human Resources.

### *Agreement*

I agree to the outline of the role as contained in this document and recognise that the contents may need to be amended from time to time to reflect changing business requirements.

I as Job holder, allow my manager to gather information from third parties where necessary for the purposes of performance management.

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| Head of EPM’s Name: |  |
| Signature: |  |
| Date: |  |