



Job Description and Person Specification Impact & Performance Officer



Fixed Term Contract			
Salary:	£29,007 - £30,179 pro rata, per annum, depending on experience.	Place of Work:	Home based
Hours of Work:	22.5 Hrs per week (Part Time)	Reporting to:	Head of Education & Development
Start Date:	ASAP	End Date:	31 st March 2027

About Navigate CIO: Navigate is an independent registered charity providing free, confidential money and debt advice, welfare benefits advice and financial education across Devon and Somerset. We specialise in supporting people who are often unable to access mainstream advice services because of complex needs or challenging life circumstances.

Our relationship-based, person-centred approach enables us to reach some of the most vulnerable people in our communities, helping them overcome financial hardship, improve their wellbeing and build long-term resilience. Our advisers work flexibly through home visits, community venues, telephone and digital support, adapting our service to meet individual needs rather than expecting people to fit traditional advice models.

What We're Looking For: We're looking for someone who is passionate about making a real difference to people's lives and who understands the power of evidence, insight and learning to improve services and demonstrate impact. You will be confident working with data, able to analyse and interpret statistical information, identify trends and patterns, and turn complex information into clear, meaningful insights for a range of audiences.

You will be curious about what works, what could work better and, most importantly, the difference our services make to the people and communities we support. You will be equally comfortable working with numbers and listening to people's experiences, recognising that understanding impact requires both robust quantitative data and meaningful qualitative evidence.

A key part of the role will involve meeting directly with clients across Navigate's projects and services to hear about their experiences and understand the difference that support has made to their lives. You will be able to build rapport with people from a wide range of backgrounds and circumstances, ask thoughtful and sensitive questions, and ensure that clients' voices and experiences are represented respectfully and authentically in our evaluation, funder reporting, fundraising and annual Impact Report.

You will be highly organised and able to take responsibility for monthly, quarterly and annual funder reporting deadlines across all Navigate projects, bringing together information from different services and sources to produce accurate, engaging and evidence-based reports. You will have strong analytical and written communication skills, with the ability to combine statistical information, outcomes, client feedback and real-life experiences to tell a compelling and credible story about our impact.

You do not necessarily need to come from a money advice background. We are looking for someone with strong analytical skills, excellent attention to detail and a genuine commitment to using data and evidence to make a difference. You may have experience in monitoring and evaluation, impact measurement, data analysis, research, performance, reporting or a related area.

You will be compassionate, curious, organised and solution-focused, with excellent communication skills and a collaborative approach. You will be committed to continuous improvement and excited by the opportunity to help Navigate better understand, strengthen and communicate the difference our work makes.

Working at Navigate: At Navigate, we know that our people are our greatest strength. We invest in training, supervision, wellbeing and professional development, creating an environment where people feel supported to do their best work. We encourage innovation, embrace new technology where it improves services, and are always looking for better ways to support both our clients and our team.

Working at Navigate is genuinely rewarding. You'll become part of a friendly, supportive team that believes everyone deserves the opportunity to recover from financial hardship and build a more secure future.

In this role, you will have the opportunity to see the difference our work makes across individuals, families and communities and play a central part in helping us understand that impact, learn from it and communicate it to funders, partners and the wider community.

Job Purpose: To lead on monitoring, evaluation, performance, and impact reporting across Navigate's services, ensuring we can clearly evidence the difference our work makes to individuals and communities. The postholder will develop and manage robust evaluation processes, analyse quantitative and qualitative data, and produce meaningful insights that demonstrate outcomes, inform service improvement, and meet funder requirements.

The postholder will take responsibility for all funder reporting on a monthly, quarterly, and annual basis, ensuring reports are accurate, timely, evidence-based, and responsive to individual funder requirements. They will also lead the development and production of Navigate's annual Impact Report, bringing together statistical analysis, service performance data, client outcomes, case studies, and qualitative evidence to communicate the reach and impact of our work.

A key part of the role will involve meeting directly with clients to understand and capture their experiences of Navigate's services. These first-hand insights will provide rich qualitative evidence for funder reports, impact reporting, service evaluation, and organisational learning, alongside the analysis and interpretation of statistical and performance information.

This role is central to ensuring Navigate's services are evidence-led, high quality, accountable, and responsive to client need, and that the organisation can communicate its impact clearly and credibly to funders, partners, stakeholders, and the wider community.

Key Responsibilities

Impact & Evaluation

- Develop and implement a robust evaluation framework to evidence service impact
- Manage pre- and post-advice client surveys to measure changes in:
 - financial confidence
 - stress levels
 - knowledge
 - financial stability
- Coordinate and analyse follow-up surveys (e.g. 6 months post-intervention) to evidence sustained outcomes and behaviour change
- Collect and develop case studies and client journeys to demonstrate real-life impact

Performance Monitoring

- Monitor service performance using the organisation's case management system (e.g. AdvicePro)
- Ensure accurate, consistent data capture across services
- Track KPIs, outputs, and outcomes against contractual and organisational targets
- Identify trends, risks, and areas for improvement

Reporting & Insight

- Produce high-quality reports for funders, senior management, and trustees
- Translate data into clear, meaningful insights and impact narratives
- Support bid writing and funding applications with evidence of impact
- Create annual reports and external communications

Quality & Data Management

- Ensure data integrity, accuracy, and compliance with GDPR and data protection standards
- Support staff to improve data recording and understanding of outcomes
- Work with teams to embed a culture of evidence-based practice

Service Development

- Use data and feedback to inform service design and continuous improvement
- Work collaboratively with operational teams and partners to strengthen delivery
- Support the development of new tools, processes, and systems to enhance impact measurement

Partnership & Collaboration

- Work with partner organisations to align monitoring and reporting approaches
- Support consistent data collection and reporting across partnership delivery

Person Specification

Experience

- Experience in monitoring, evaluation, and/or performance management
- Experience analysing data and producing reports
- Experience working in a service delivery environment (e.g. advice, health, or community services)
- Experience working with outcomes frameworks or impact measurement

Knowledge & Skills

- Strong analytical and data interpretation skills
- Ability to present complex information in a clear and accessible way
- Understanding of impact measurement approaches (e.g. surveys, case studies, outcomes tracking)
- Strong IT skills, including Excel and/or case management systems
- Knowledge of GDPR and data protection principles
- Excellent organisational and attention-to-detail skills
- Strong communication and stakeholder engagement skills

Qualifications

- Relevant qualification (e.g. data analysis, social research, evaluation) or equivalent experience
- Commitment to ongoing professional development

Personal Attributes

- Passion for demonstrating impact and improving services
- Curious, analytical, and solution-focused
- Collaborative and able to work across teams and partnerships
- High level of integrity and professionalism
- Commitment to equality, diversity, and inclusion

Desirable

- Experience in the charity or advice sector
- Experience using systems such as AdvicePro
- Experience supporting funding bids or reporting to funders
- Understanding of financial wellbeing, money advice, or social inclusion services