



Job Description

Job Title:	Monitoring and Evaluation Officer
Directorate/Team:	Commercial and Investment
Location:	16 Summer Lane or other site/location
Responsible to:	Senior Investment Portfolio Manager
Responsible for:	0
Key working relationships: (internal)	Project officers across Constituent Authorities, internal Directorates of WMCA and West Midlands Development Capital.
Key working relationships: (external)	

Purpose of the Post

This is a key role reporting directly to the Senior Investment Portfolio Manager. The position supports the delivery of the investment strategy for the West Midlands Combined Authority (WMCA) combining innovative approaches to secure and deploy investment.

The Monitoring and Evaluation Team will work with the Investment and Commercial Activities Director to ensure best value for money is being achieved across the portfolio of investments. This will involve strong relationship management with Constituent Authorities, internal Directorates of WMCA and West Midlands Development Capital.

The different Directorates are responsible for delivering against their plans to meet the long-term strategy for the Region and their particular area and the role of the Investment and Commercial Activities Directorate is to support and provide expert advice with this.

There will also be interaction with the Mayor of the West Midlands and at a senior level with Directors of the seven Metropolitan Councils and wider membership of non-constituent authorities where the WMCA may co-invest.

Accountabilities

- Ensure effective monitoring and evaluation of investment projects, tracking delivery against agreed milestones, outputs, budgets, and business case objectives.
- Maintain accurate oversight of project performance by extracting, managing, and reporting data from funding agreements, business cases, and governance processes.
- Provide informed advice and recommendations to senior stakeholders on risks, changes to business cases, and actions required to ensure value for money and compliance.
- Build and manage strong relationships with delivery partners, internal teams, and external stakeholders to support collaboration, governance, and successful project delivery.
- Support continuous improvement and strategic development of investment programmes, including contributing to new funding bids, enhancing monitoring frameworks, and improving ways of working.

Responsibilities

Strategic

- Take a proactive role in assessing implications as projects develop
- Recommend strategy for dealing with potential changes to Business Cases and advise Sponsors to ensure continued value for money
- Work with the Investment team and Sponsors to ensure new projects are conceived to deliver quantifiable outputs and help shape proposals
- Develop new ways of working to deliver new investment funds and improve efficiency
- Recommend and action improvements in Monitoring and Evaluation
- Provide ad-hoc support in compiling investment bids for new funding streams
- Work flexibly and with integrity to meet the needs of the WMCA and the Commercial and Investment function.

People

- Discuss with Delivery Body any departures and recommend action to the Senior Investment Portfolio Manager
- Provide a high-quality relationship management service with WMCA directorates, members, and funders
- Work with Assurance team and collaborate with project Sponsors on Change Requests and compliance
- Provide early warning to Senior Investment Portfolio Manager on risks
- Provide ad-hoc support to Head of Structuring (collaborative engagement)

Operational

- Ensure investments deliver Business Cases on time, budget, and outputs
- Extract and manage data from Funding Agreements, Business Cases, and Approvals
- Maintain and update diary systems and track milestones, outputs, and conditions
- Monitor and evaluate investments against milestones and outputs
- Design and produce performance data (reports/dashboards)
- Ensure projects are properly closed with evaluation and lessons learned
- Work with Assurance team through governance and approval processes
- Ensure regulatory compliance is maintained across investments
- Work with Assurance team to understand risks and monitor them
- Prepare dashboards for Investment Board on progress against objectives

Financial

- Liaise with Finance colleagues to track budgets at project/programme level
- Monitor delivery against agreed budgets within Business Cases
- Assess value for money when recommending changes to Business Cases
- Ensure Value for Money and follow the appropriate governance processes for dealing with any financial activities.

Other

- Support Head of Structuring in agreeing Heads of Terms and converting them into Legal Agreements
- Ensure compliance with Combined Authority governance processes
- Support Change Request processes from a governance perspective
- Represent the WMCA in a professional manner.
- Undertake such tasks as may reasonably be expected commensurate with the scope and level of the role.

Person Specification

Candidates/post holders will be expected to demonstrate the following:	Essential / Desirable		How Evidenced?		
	E	D	A*	I*	T*
Experience					
Experience of Business Case composition	X		X	X	
Proven delivery of public sector investment		X	X	X	

Project appraisal against output, budget and timing		X	X	X	
Skills / Knowledge	E	D	A*	I*	T*
A good understanding of budgets and assessing/ forecasting of cost against said budgets	X		X	X	
Ability to report information in a clear, concise and appropriate manner	X		X	X	
An ability to be working on a variety of projects at the same time, with ability to prioritise most important projects and not compromise other ongoing projects	X		X	X	
Ability to process complex information, assess what is important and prioritise actions following this evaluation	X		X	X	
Understanding of real estate and/ or infrastructure projects		X	X	X	
Experience of taking projects from the development of a concept stage to delivery, in environments where reliance upon others outside the direct team is required		X	X	X	
Knowledge of Green Book valuations and calculation of Benefit Cost Ratios		X	X	X	
Qualification / Education / Training	E	D	A*	I*	T*
Degree Level in an appropriate subject	X		X	X	
PRINCE2 Foundation or Practitioner (Desirable)		X	X	X	
P3O Foundation or Practitioner (Desirable)		X	X	X	
MSP Foundation or Practitioner (Desirable)		X	X	X	

*Key: A = Application, I = Interview, T = Testing/Assessment

Core Expectations	
Health, Safety & Wellbeing	All employees have a duty to take reasonable care for the health, safety, and wellbeing of themselves and of other persons who may be affected by their acts or omissions at work; and co-operate with their employer so far as is necessary to enable it to successfully discharge its own responsibilities in relation to health, safety, and wellbeing.
Equality & Diversity	Promote and champion equality and diversity in all aspects of the role.
Learning & Development	Participate in and take responsibility of any learning and development required to carry out this role effectively.
Performance Management	Actively engage in the performance management process and take responsibility for managing performance outcomes.
GDPR	Ensure the reasonable and proportionate protection, processing, sharing, and storing of WMCA information in accordance with the relevant legislation, corporate policies, and in the best interests of the data subjects (Data Protection/GDPR), the WMCA, our partners, and the West Midlands, in all aspects of the role.
Adherence to Policies	Be aware of and comply with all organisation policies.
Matrix Working	Work in a matrix way when required by actively collaborating across traditional boundaries—such as directorates, functions, or geographic areas—to achieve shared goals. Depending on your role, you may contribute to multiple projects or workstreams, often working alongside different teams and leaders.
Business Continuity	All staff should actively participate in business continuity training and exercises when required, ensuring they understand and follow business continuity plans and procedures to maintain organisational resilience during disruptions.
Other	There may be a requirement to work outside normal office hours on occasion, including a requirement to work within stakeholder and partner offices within the WMCA constituent area on a regular basis.

Values	
Collaborative	We work as one organisation, building trust, connection and shared purpose across teams and partners to create the biggest impact for our region.

Inclusive	Every voice matters – we create belonging, fairness and psychological safety so everyone can thrive.
Innovative	We think future and act smarter – embracing curiosity, creativity and continuous improvement to shape the future.
Driven	Focused on impact – leading with clarity, care and courage to deliver meaningful results for the West Midlands.

Our culture is built on collective leadership, where everyone plays a part in shaping how we work and succeed together. Guided by our values, we create an environment where people feel valued, supported and able to contribute their best. Through behaviours grounded in clarity, care and courage, as set out in our Leadership Statement we are making the West Midlands Combined Authority the best place to work and belong.

Additional Post Requirements

Politically Restricted Post		Disclosure and Barring Service (DBS)				Vetting	
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Basic <input type="checkbox"/>	Standard <input type="checkbox"/>	Enhanced <input type="checkbox"/>	None <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Job Evaluation Details

Date Evaluation Agreed	JEP Reference	Grade	Job Family
		SP39 - SP43	
Position Reference	CA11862		