



Investment Manager – Information Pack

Dear Candidate,

Thank you for showing an interest in joining our team. At Impetus we believe that all young people deserve to succeed in school and in work, whatever their background. We are pleased to be able to expand our team to support a growing number of portfolio partners, to reach and impact more lives. The role of Investment Manager presents an exciting opportunity to contribute meaningfully to the charities we serve, the team itself, and the whole of Impetus.

We support a portfolio of 25 high potential organisations in the youth sector, helping them deliver benchmark-beating employment and education outcomes for young people.

We believe the strength of our approach resides in three things:

1. Building deep, trust-based sustainable relationships with charity leaders by, investing time, kindness, integrity and honesty
2. Providing our charities multi-year, unrestricted funding to help them become sector-leading organisations and scale their impact
3. Offering tailored advice to charity leaders' most pressing and strategic questions, including their mission, programme design, performance management, growth planning, and financial resilience.

Working with our partners is a privilege. The leaders we support are incredibly talented, passionate and keen for external advice, and the issues we work through with them are stimulating and stretching. Our senior management relationships are some of the most fulfilling relationships many of us have had in our careers, while the growth and impact performance of our partners are testament to charities' commitment to disadvantaged young people and the influence we have on their development.

Charities and funders often comment on the quality of our people. Our team is analytical, and data driven; we are deeply relational, low-ego and collaborative. We actively invest in our colleagues holding regular training and community of practice sessions and use skills-based assessments to tailor development.

As an organisation we seek to embed diversity of thought, background and experience in every aspect of our work and actively challenge our assumptions to better deliver change. Over the past four years we have taken action to help reduce racial inequality in the youth sector. In 2021 we launched our Connect Fund to support diverse leaders and their robust solutions to the entrenched employment gap faced by young people from ethnic minority backgrounds compared with their white peers. We have also built a highly regarded Leadership Academy for emerging youth sector leaders from ethnic minority backgrounds which is sponsored by Bank of America and State Street.

If you are looking for a role combining strategic thinking, analytical insight and influencing emerging leaders, as well as the opportunity to work with a supportive team to transform young lives, I hope you will apply to work with us.

I look forward to hearing from you.

Sebastien Ergas
Portfolio Director



This pack contains all the relevant information you will need to apply for this role:

- Information about the [organisation](#) and our [values](#)
- Information about the [team](#) and the [role](#)
- The [job description](#) – key responsibilities and person specification
- Our commitment to [equality, diversity and inclusion](#)
- [Terms and conditions](#) and [benefits](#) of working for Impetus
- Details on the [application and recruitment process](#)

The closing date for receipt of completed applications is 11.59pm Monday 21st April.

If you would like to find out more about this role or have any questions regarding the recruitment process please contact recruitment@impetus.org.uk



About Impetus

Impetus is a registered charity and our charity number is 1152262.

Impetus transforms the lives of young people from disadvantaged backgrounds by ensuring they get the right support to succeed in school, in work and in life.

We find, fund and build the most promising organisations working with these young people, providing core funding and working shoulder-to-shoulder with their leaders over the long term to help them become stronger organisations.

Impetus currently has 52 members of staff, supporting 25 charities with programmes across England, Wales and Scotland.

At Impetus we focus on the critical factors that influence the education and employment outcomes for disadvantaged young people in the UK, working with charities that have the potential for impact at scale, helping their leaders to deliver lifechanging, benchmark-beating outcomes.

We provide these charities with the funding and the tools to grow and deliver on their promises to the young people they serve. We also seek to influence government and the wider sector to back effective support for young people and invest with other like-minded organisations to tackle the most difficult and under-supported challenges. We are resolutely focused on outcomes and impact, driven by quality evidence.



Our Values

Evidence led and results driven for young people

We pursue excellence for the young people we work with, are wholly committed to better outcomes, unapologetically results driven, and accountable for our actions.

High trust, high challenge

We invest the time, kindness, integrity and honesty needed to build and sustain long-term relationships. We focus on developing high trust, to allow for high challenge, helping our colleagues, partners and supporters to be our very best selves in pursuit of our mission.

Diversity enables us to thrive

We seek to embed diversity of thought, background and experience in every aspect of our work. We are open, thoughtful and proactive in better understanding and challenging our assumptions to better deliver the change we seek.

Brave and open

We are brave and open; exploring new solutions to long-term problems, asking difficult questions well; learning from mistakes and challenging the status quo when needed.

Collaboration always

We will not succeed alone. We seek meaningful, productive partnership with others to achieve our mission and drive systems change for young people.



About the Investment team

The Investment team is responsible for selecting portfolio partners, managing our investments in these partners and supporting them to improve and scale their impact.

The Investment team also leads the Impetus Leadership Academy, a leadership development programme to support talent from ethnic minority backgrounds in the UK youth sector to progress into senior leadership roles.

The team is made up of 18 people, including former teachers, charity chief executives, charity impact leads, management consultants, social investment portfolio managers and impact consultants.

The team is led by a Portfolio Director who sits on the Senior Management Team. The Portfolio Director has 5 direct reports: a Deputy Portfolio Director, three Sector Leads (who lead our work in school engagement, school attainment and employment sectors) and an Impact Lead. Sector Leads line manage 6 Investment Directors. Investment Directors line manage Investment Managers (currently 5). Investment Directors and Investment Managers tend to primarily focus on a sector but might have mixed portfolios, depending on need, experience and interest.

The Investment team has a good track record of role progression. All four Sector Leads and a number of our Investment Directors were promoted from within the team.

The team is passionate, rigorous, determined, creative and warm. We care deeply for our colleagues, our charity partners and the young people we serve.

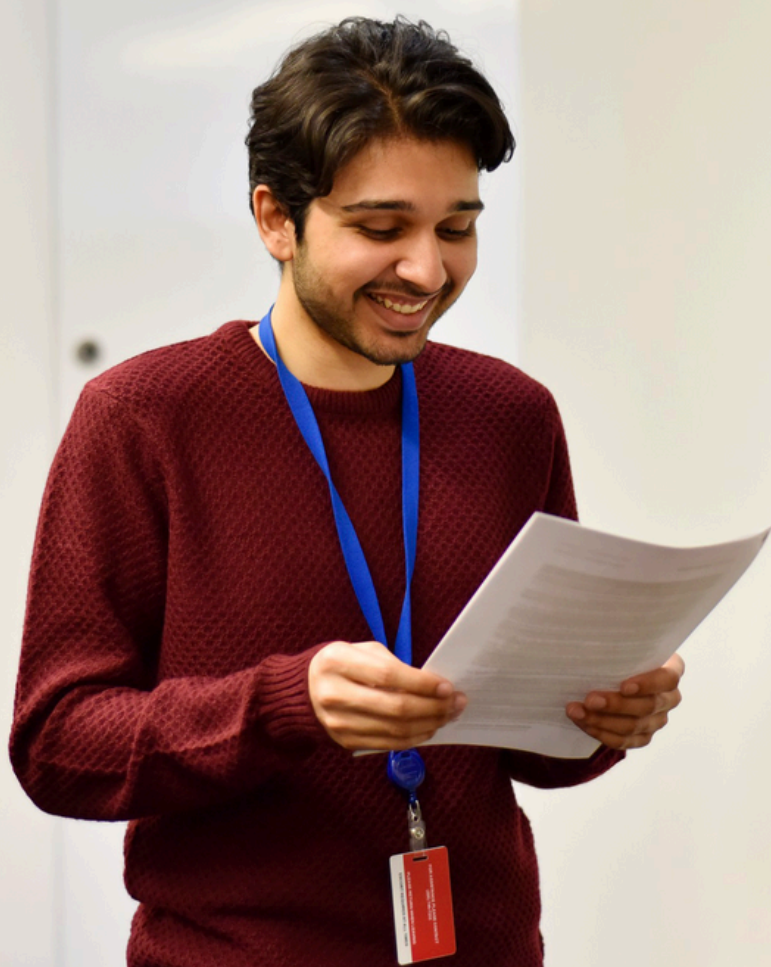


About the Investment Manager role

The Investment Manager (IM) works as an integral part of the Investment team to help deliver our mission – supporting portfolio partners to deepen their impact and scale their outcomes. This role works closely with Investment Directors and other Investment Managers, including both charity-facing support and internal support to the Investment team.

The IM uses analytical rigour, project management and relationship skills to support a portfolio of amazing organisations that, together, will help shift the life chances and outcomes of young people from disadvantaged backgrounds in the UK.

The IM role works across the portfolio, with the opportunity to work with various charities and Investment Directors, and may be involved in delivering the Impetus Leadership Academy.



Job description

Title: Investment Manager

Team: Investment team

Reports to: Investment Director

Direct reports: n/a

Salary: £55,564 per annum pro rata plus benefits

Contract: Permanent

Working hours: Full time (37.5 hours per week) or part time (we are happy to consider requests for part time hours)

Location: Impetus office (currently based in Charing Cross, Central London)

Working Arrangement: Hybrid working - at least two days per week in the Impetus office in Central London.

We may ask you to come to the office three days per week during the first three months to help set you up well for success – ensuring you get the support you need to thrive.

In addition to this, all staff are expected to attend regular Impetus in-person events. These include staff away days (usually 2 or 3 per calendar year), training events (usually 1 or 2 per month) and a monthly Townhall meeting where we come together in person for lunch and intentional cross-team working.

Travel may also be required to visit portfolio partners for monthly meetings or pre arranged workshops.

Starting date: As soon as possible



Key responsibilities

1. Investment management

- Working closely with Investment Directors to support portfolio partners across all areas of our work – leadership, impact and sustainability – leading specific work streams like impact and/or financial management.
- Building trust-based relationships with charity leaders including CEOs, delivery staff and programme / impact leads, to become a valued advisor on practice improvement.
- Working closely with staff at our partners charities, providing guidance, thought partnership and capacity building.
- Working with Impact teams at charity partners to develop and refine impact management practices; data collection, dashboard development, performance review meetings, programme design and evaluation.
- Coaching charities' heads of functions (e.g. Director of Impact) to develop as leaders and help drive an impact-led approach within their organisations.
- Curating pro-bono projects leveraging our large network of corporate volunteers to provide targeted support in key areas for our charity partners (e.g. strategy, marketing advice, financial analysis).
- Supporting Investment Directors with design and delivery of theory of change workshops, analysing charity impact data, developing and analysing pre-workshop surveys, facilitating workshops.
- Supporting Impetus' quarterly peer learning forums for our charity partners, in particular the Impact Forum.
- Supporting the governance of our investments, preparing reports for Investment and Steering Committees.

2. Investment team support

- Supporting/leading the annual cycle of identifying new investments – mapping the landscape of charities in thematic areas (e.g. apprenticeships and skills), identifying high potential charities through analysis of key impact and financial data and reviewing the current evidence base.
- Playing a key role in due diligence of new charities, reviewing charity information (quantitative and qualitative) and drawing insights about their suitability for investment. This includes considering impact and scale potential, financial stability and developing a business case for investment including identifying risks. Requires strong relationship management with potential charity partners.
- Developing knowledge and expertise in education and youth employment, staying up to date on relevant sector developments.
- Working closely with the Public Affairs team and ensuring teams are integrated in their thinking and approach – both ensuring we are coordinated in our support to the sector and working on cross-team projects that support the wider employment and education sectors.

3. Support to the Impetus organisation

- Working collaboratively on Impetus' public affairs and philanthropy objectives through input into case studies, research and policy campaigns, donor reports and events.
- Sharing the learning from our work across the team, across the organisation and externally working within Impetus strategy, policies and procedures.

Person specification

Essential

- A commitment to Impetus' mission.
- Able to build productive, trust-based relationships internally and with external stakeholders including charity partners and co-investors.
- Strong relationship building and management skills.
- Highly analytical and numerate, with good command of Excel.
- Clear and strategic thinker; able to identify key insights from a range of data outputs and translate into clear communication, including PowerPoint.
- Proven ability to work independently.
- Desire to be a thought partner to Investment Directors – contributing actively to team discussions and debate.
- Strong planning and time management, able to balance between priorities.
- Displays tenacity and initiative.
- Growth mind-set; seeks out and acts on feedback.
- A strong interest in partnering closely with charities that are doing what it takes to get better
- A commitment to equity, diversity and inclusion in our work and our organisation.

If you don't tick all these boxes, but still feel that you fit the profile, please apply anyway.

Desirable

- Experience in consulting, investment management, or other in-depth grant making and capacity building work.
- Previous experience working with charities. Could be in a previous role, pro-bono volunteer or Trustee capacity.
- Experience in UK education and employability sectors.
- Experience in charity impact management and/or evaluation.
- Financial acumen - financial modelling, fundraising pipeline development, review of annual accounts and assessment of financial risk.
- Project management experience.



Our commitment to equity, diversity and inclusion

We believe that a diverse workforce leads to an organisation that is more open, creative and gets better results.

We want our team at Impetus to represent the diversity of the people and communities we serve. We also want our team to be one where different experiences, expertise and perspectives are valued, and where everyone is encouraged to grow and develop.

We want to reach a diverse pool of candidates. We are happy to consider reasonable adjustments that potential employees may need in order to be successful.

We recognise the importance of a good work/life balance. We do everything we can to accommodate flexible working, including working from home, working part-time, job shares and other arrangements.

Please just let us know in your application or at any stage throughout the process (and beyond) if these are options you'd like to explore.

Impetus is an equal opportunity employer and is determined to ensure that no applicant or employee receives less favourable treatment on the grounds of age, disability, gender reassignment, marriage and civil partnership, race, religion or belief, sex and sexual orientation. We value diversity and welcome applications from people of all backgrounds.



How to apply

Please click [here](#) to apply.

You will need to:

- Complete the online form (including the equal opportunities monitoring form)
- Upload a comprehensive CV and supporting statement

The supporting statement should be no more than two sides of A4 and should address the criteria in the person specification.

You should also include the contact details of two referees, one of whom must be your current or most recent employer. Referees will only be approached with your express permission.

As part of our commitment to flexible working we will consider a range of options for the successful applicant. All options can be discussed at interview stage.

The deadline for applications is 11.59pm Monday April 21st 2025.

Interviews

First round interviews will take place week commencing 28th April 2025.

Second round interviews will take place week commencing 5th May 2025.

You will also be required to provide proof of your eligibility to work in the UK.

Personal Data

Your personal data will be shared for the purposes of the recruitment exercise. This includes our HR team, interviewers (who may include other partners in the project and independent advisors), relevant team managers and our IT service provider if access to the data is necessary for performance of their roles. We do not share your data with other third parties, unless your application for employment is successful and we make you an offer of employment. We will then share your data with former employers to obtain references for you. We do not transfer your data outside the European Economic Area.



Terms and conditions and benefits of working for Impetus

We are committed to supporting staff in a range of ways. The tables below detail some of the support provided:

Financial support

Benefit	Detail	Eligibility
Pay	Target is to pay within plus or minus five per cent of the upper quartile for the role in the charity sector	All staff eligible
Pension	In line with auto enrolment legislation all eligible employees will be automatically enrolled into The Pensions Trust pension scheme. 5% employer contribution. 3% employee contribution	All staff eligible
Death in service	Four times salary	All staff eligible
Season ticket loan	Interest free - repayable over 10 months	On completion of six-month probation period
Eye test vouchers	Reimburse for the cost of eye examination up to the value of £25 per annum	All staff eligible
BHN Extras	Staff discount site offering special perks for employees	All staff eligible
Cycle to work scheme	Staff save up to 42% on a new bike, e-bike and cycling accessories through this salary sacrifice benefit and can spread the cost of their bike and accessories interest-free over 12 months	All staff eligible
Home and Tech Scheme	Staff save up to 8% on home and tech products at Currys and IKEA, through this salary sacrifice benefit and can spread the cost interest-free over 12 months	All staff eligible

Work life balance

Benefit	Detail	Eligibility
Annual leave	28 days plus bank holidays (this includes three days between Christmas and New Year) pro-rata for part time staff	All staff eligible
	Flexible bank holidays. Staff can choose to work on five of the UK bank holidays and use their annual leave on alternative days (with the exception of those bank holidays that fall during Christmas Closure)	
	Ability to carry over a maximum of five days with any additional days to be at discretion of relevant member of SMT and Director of Finance and Operations and allowed only on an exceptional basis	
	Birthday leave – staff can take a day of leave on their birthday (or the closest available working day if it falls on a bank holiday or weekend)	
	After three years service staff will receive an additional two days annual leave (pro rata). Total entitlement 30 days per year	Staff with three years service
Sick pay (OSP)	Occupational sick pay (OSP) - Six weeks full pay and six weeks half pay in rolling 12 month. Staff eligible from day one of employment	All staff eligible subject to statutory requirements
Compassionate leave and pay	Discretion of line manager (up to three days paid)	All staff eligible subject to criteria (which include, for example, closeness of family member in event of death in family)

Work life balance

Benefit	Detail	Eligibility
Dependency leave and pay	Usually unpaid but paid time off may be granted at discretion of line manager	All staff eligible subject to criteria
Maternity leave	Statutory Maternity Leave (SML) - 52 weeks	All staff eligible subject to statutory requirements
Maternity pay	Statutory Maternity Pay (SMP) - six weeks at 90% salary followed by 33 weeks at SMP rate	Continuously employed for at least 26 weeks up to any day in the "qualifying week" (15th week before the child is expected)
	Occupational Maternity Pay (OMP) -13 weeks at full pay followed by 33 weeks at Statutory Maternity Pay (SMP) rate	Continuously employed for at least 52 weeks up to any day in the "qualifying week" (15th week before the child is expected)
Paternity leave	Statutory Paternity Leave (SPL) - two weeks	All staff eligible subject to statutory requirements
Paternity pay	Statutory Paternity Pay (SPP) - two weeks at SPP rate	Continuously employed for at least 52 weeks up to any day in the "qualifying week" (15th week before the child is expected)
	Occupational Paternity Pay (OPP) - two weeks at full pay	Continuously employed for at least 52 weeks up to any day in the "qualifying week" (15th week before the child is expected)

Work life balance

Benefit	Detail	Eligibility
Adoption leave	Statutory Adoption Leave (SAL) maximum 52 weeks	All staff eligible subject to statutory requirements
Adoption pay	<p>Statutory Adoption Pay (SAP) six weeks at 90% followed by 33 weeks at SMP rate</p> <p>Occupational Adoption Pay (OAP) - 13 weeks at full pay followed by 33 weeks at Statutory Adoption Pay (SAP)</p>	<p>Continuously employed for at least 26 weeks up to any day in the week they were matched with the child</p> <p>Continuously employed for at least 52 weeks up to any day in the "qualifying week" (15th week before the child is expected)</p>
Shared parental leave	Statutory - maximum 50 weeks	All staff eligible subject to statutory requirements
Shared parental pay	<p>Statutory Shared Parental Pay (ShPP) - maximum 37 weeks at ShPP rate</p> <p>Occupational Shared Parental Pay (OShPP) - 11 weeks at full pay</p>	<p>Continuously employed for at least 26 weeks up to any day in the "qualifying week" (15th week before the child is expected)</p> <p>Continuously employed for at least 52 weeks up to any day in the week they were matched with the child</p>
Parental leave	Statutory - 18 weeks of unpaid leave	All staff eligible subject to statutory requirements
Flexible hours	10am to 4pm are core hours. Office hours are 8am to 6pm	All staff eligible
Work from home	Occasional home working available. Regular working at home available upon request	All staff eligible

Work life balance

Benefit	Detail	Eligibility
Charitable duties or volunteering	Four half days leave per year subject to agreement from line manager and HR	All staff eligible
Employee assistance programme	Health Assured provides a comprehensive employee support service which includes a 24/7 confidential helpline, counselling and bereavement support, financial, legal and medical information, Wisdom Mobile App and online resources	All staff eligible
Health cash plan	Allows staff to claim money back for health treatments and access to services. Also includes employee assistance, discounted rates to health partners and gym memberships	All staff eligible

Professional Development

Benefit	Detail	Eligibility
Learning and development	A range of organisational and individual training and development opportunities Budget - £750 is allocated to each individual annually, plus a central budget agreed annually	All staff eligible
Professional subscription	Paid for, subject to agreement from HR and line manager	Relevant to role
Professional qualification	May be able to help - discuss with line manager and HR	All staff eligible
Sabbatical leave	Opportunity to request up to three months unpaid sabbatical leave	After 10 years service

