Impetus

Investment Manager - Information Pack

Impetus

Dear Applicant,

Thank you for requesting the application pack and for your interest in working for Impetus.

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
- Details on the application and recruitment process
- Terms and conditions and benefits of working for Impetus

The closing date for receipt of completed applications is 23:59 on Sunday 29 March 2026.

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.

Impetus

About Impetus

Impetus transforms the education and employment outcomes of young people from disadvantaged backgrounds.

We do this by using our deep expertise and high calibre networks to give the best nonprofits in these sectors the essential ingredients to have a real and lasting impact.

Through a powerful combination of long-term funding, direct capacity building support from our experienced team and our pro bono partners, alongside research and policy influencing to drive lasting systems change, we work towards a society where all young people can thrive in school, pass their exams and unlock the doors to sustained employment, for a fulfilling life.

You would be joining a team that is passionate, rigorous, determined, creative and warm. We care deeply for our colleagues, our portfolio partners and the young people we serve.

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

Impetus

Our Values

In 2022 the Impetus staff agreed the following set of Values to act as our guiding principles as an organisation and help us to remain focused on achieving our mission to support young people from disadvantaged backgrounds.

We are brave and curious

We are bold and brave in our pursuit of better outcomes for young people. We lead with curiosity and stay open to new perspectives. We support one another to take considered risks and learn together.

We bring high trust, high challenge

We build strong, long-term relationships through honesty, kindness, integrity, and respect. We create the space for open, constructive challenge, where colleagues, partners and supporters feel safe to speak up, hold each other to account, and bring their best in pursuit of our mission.

We are 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.

We thrive through diversity

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.

We always seek collaboration

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

About the team

The Investment team is responsible for selecting portfolio partners, managing our charity investments and supporting our portfolio partners 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 19 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 6). 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 Leads and a number of our Investment Directors were promoted from within the team.

The team is passionate, rigorous, determined, creative and warm. We come from a range of backgrounds and bring a broad mix of perspectives. We care deeply for our colleagues, our portfolio partners and the young people we serve.

About this role

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 our growing portfolio of charity and non-profit partners, in order to reach and impact more lives. The role of Investment Manager presents an exciting opportunity to contribute meaningfully to the organisations we serve, the team itself, and the whole of Impetus.

We support a portfolio of 23 high potential charity and non-profit partners in the youth sector, helping them deliver benchmark-beating employment and education outcomes for young people, and to grow.

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

- Building deep, trust-based sustainable relationships with charity leaders by, investing time, kindness, integrity and honesty.
- Providing our charities multi-year, unrestricted funding to help them become sector-leading organisations and scale their impact.
- 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 portfolio 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. The growth and impact performance of our partners are testament to their commitment to disadvantaged young people and the influence we have on their development.

Partners 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

Impetus

change. Over the past two 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, with generous from Bank of America and State Street Foundation.

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, Impetus

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Job description

Title:	Investment Manager
Team:	Investment team
Reports to:	Investment Director
Direct reports:	None
Salary:	£50,607 per annum (Includes a base salary of £44,364 plus a £6,243 market supplement) 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:	Hybrid working - at least two days per week in the Impetus office (currently based in Charing Cross, 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, training events and a monthly Townhall meeting where we come together in person for lunch and intentional cross-team working
Starting date:	As soon as possible

**The market supplement is applied to specific roles to ensure competitiveness in attracting candidates with the required skills and experience*

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

Impetus

Key responsibilities

Finding high potential charities and non-profit organisations to join our portfolio

- Supporting the annual cycle of identifying new investments - mapping the landscape of charities in thematic areas (e.g. apprenticeships and skills), conducting structured analysis of key impact and financial data and reviewing the current evidence base to identify high potential charities and inform options for Investment Directors.
- Contributing to due diligence of new organisations by reviewing quantitative and qualitative charity information and preparing clear assessments of suitability for investment. This includes considering impact and scale potential, financial stability and summarising risks and recommendations for senior review. Requires strong relationship management, in co-ordination with Investment Directors, when engaging with potential charity partners.
- Supporting Investment Directors in developing, preparing and supporting with presentations of high-quality investment propositions to our Investment Committee.

Supporting and managing relationships with portfolio partners

- Working closely with Investment Directors to support portfolio partners across all areas of our work - leadership, impact and sustainability – owning defined workstreams (e.g. impact management or financial analysis).
- Building trust-based relationships with portfolio partners including senior leaders and delivery staff, acting as a valued advisor on practice improvement, contributing insight and support while escalating strategic issues to Investment Directors and Programme/Impact leads.
- Working with Impact teams at portfolio partners to develop and refine impact management practices; including data collection, dashboard development, performance review meetings, programme design and evaluation.
- Supporting portfolio partners functional leads (e.g. Director of Impact) to develop as leaders by contributing insights and tools to help drive and strengthen impact-led approaches within their organisations.
- Coordinating pro bono projects leveraging our large network of corporate volunteers to provide targeted support for our portfolio partners in key areas (e.g. strategy, marketing advice, financial analysis).
- Supporting Investment Directors with the design and delivery of theory of change workshops, conducting preparatory analysis of charity impact data developing and analysing pre-workshop surveys and co-facilitating workshops.

- Supporting the coordination and delivery of Impetus' quarterly peer learning forums for our portfolio partners, in particular the Impact Forum.
- Supporting investment governance by preparing clear and accurate reports for Investment and Steering Committees.

Support to Impetus

- Developing knowledge and expertise in education and youth employment domains, staying up to date on relevant sector developments and applying this insight to support analysis and decision making.
- Working collaboratively on Impetus' public affairs and philanthropy objectives by contributing evidence, insight and content to case studies, research, policy campaigns, donor reports and events.
- Sharing the learning from our work across the team and organisation and supporting communication of insights externally where appropriate.
- Working within Impetus strategy, policies and procedures.

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Person specification

Essential

- A commitment to Impetus' mission and values.
- Able to build productive, trust-based relationships internally and with senior external stakeholders including portfolio partners and co-investors, escalating strategic issues to Investment Directors as needed.
- Strong relationship building and management skills.
- Highly analytical and numerate, able to draw insights from a range of data sources, with good command of Excel or similar tools.
- Clear and strategic thinker; able to clearly and concisely communicate insights and key messages via a range of mediums, including PowerPoint and Word.
- Proven ability to work independently, within a defined scope and escalate risks promptly.
- Clear and analytical thinker; keen to work collaboratively with Investment Directors and contribute evidence based insights to team discussions and decision making.
- Strong planning and time management, able to balance between priorities.
- Displays tenacity and initiative in progressing work within agreed frameworks.
- Growth mind-set; seeks out and acts on feedback.
- A strong interest in partnering closely with organisations, supporting them to strengthen delivery and impact.
- 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

(candidates with one or more of the following may be particularly well suited to the role)

- 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 charity impact management or monitoring, evaluation and learning.
- Experience working in, or deep understanding of, UK education or youth employment sectors.
- Experience facilitating workshops or presenting to larger groups.
- Financial acumen – including experience supporting financial analysis and modelling, fundraising pipeline development and review of financial information e.g., annual accounts, to assess and identify financial risk
- Project Management experience Board experience in private, public or third sector
- Understanding of or experience with commissioning impact evaluations.

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Our commitment to equality, 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 any reasonable adjustments that potential employees may need to 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.

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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 23:59, Sunday 29 March 2026.

Interview

First round interviews will take place: **w/c 13 April 2026.**.

Second round interviews will take place: **w/c 20 April 2026**.

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.

Impetus

Terms and conditions and benefits of working for Impetus

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

Financial and Wellbeing Support		
Benefit	**Details**	**Eligibility**
Pay	We benchmark pay in the whole charities market and we set our pay line at the market upper quartile and pay our people in a range +/- 10%.	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.
Life Assurance	Four times salary.	All staff eligible.
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.
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.
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.
Eye test vouchers	Reimburse for the cost of eye examination up to the value of £25 per annum.	All staff eligible.
Season ticket loan	Interest free - repayable over 10 months.	On completion of six-month probation period.

Impetus

Financial and Wellbeing Support

Benefit	Details	Eligibility
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.
BHN Extras	Staff discount site offering special perks for employees.	All staff eligible.
Give as you earn (GAYE)	Membership to scheme to enable employees to make donations exempt from National Insurance.	All staff eligible.

Work life balance

Benefit	Details	Eligibility
Flexible hours	10am to 4pm are core hours. Office hours are 8am to 6pm	All staff eligible.
Hybrid working/ work from home	Opportunity to work remotely and in the Impetus office. All staff are expected to attend at least two days per week in the office as well as regular Impetus in-person events such as staff away days, training events and a monthly Townhall meeting where we come together in person for lunch and intentional cross-team working. More regular home working may be agreed through a flexible working request.	All staff eligible.

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Work life balance

Benefit	Details	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 (except for those bank holidays that fall during Christmas Closure).	All staff eligible.
	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)	All staff eligible.
	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	Staff with three years service.
	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.
Unpaid leave	Option to request additional unpaid leave. Employees can request up to five days unpaid leave per year (pro rata).	All staff eligible (after one months service).
Charitable duties or volunteering	Four half days leave per year subject to agreement from line manager and HR.	All staff eligible.

Family Friendly

Benefit	Details	Eligibility
Maternity leave	Statutory Maternity Leave (SML) - 52 weeks.	All staff eligible subject to statutory requirements.

Impetus

Family Friendly		
Benefit	**Details**	**Eligibility**
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	Occupational Paternity Pay (OPP) - four weeks at full pay.	Continuously employed for at least 26 weeks up to any day in the "qualifying week" (15th week before the child is expected).
	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.	Continuously employed for at least 52 weeks up to any day in the "qualifying week" (15th week before the child is expected).
Adoption leave	Statutory Adoption Leave (SAL) maximum 52 weeks.	All staff eligible subject to statutory requirements.
Adoption pay	Statutory Adoption Pay (SAP) six weeks at 90% followed by 33 weeks at SMP rate.	Continuously employed for at least 26 weeks up to any day in the week they were matched with the child.
	Occupational Adoption Pay (OAP) - 13 weeks at full pay followed by 33 weeks at Statutory Adoption Pay (SAP).	Continuously employed for at least 52 weeks up to any day in the

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Family Friendly		
Benefit	**Details**	**Eligibility**
		"qualifying week" (15th week before the child is expected).
Shared parental leave	Statutory - maximum 50 weeks.	All staff eligible subject to statutory requirements.
Shared parental pay	Statutory Shared Parental Pay (ShPP) - maximum 37 weeks at ShPP rate.	Continuously employed for at least 26 weeks up to any day in the "qualifying week" (15th week before the child is expected).
	Occupational Shared Parental Pay (OShPP) - 9 weeks at full pay.	Continuously employed for at least 52 weeks up to any day in the week they were matched with the child.
Parental leave	Statutory - 18 weeks of unpaid leave.	All staff eligible subject to statutory requirements.
Compassionate leave and pay	Discretion of line manager (up to five days paid).	All staff eligible subject to criteria (which include, for example, closeness of family member in event of death in family).
Parental Bereavement leave and pay	Two weeks paid leave.	All staff eligible subject to statutory requirements.
Dependency leave and pay	Discretion of line manager (up to five days paid).	All staff eligible subject to criteria.
Carers leave and pay	One week paid leave	All staff eligible subject to statutory requirements

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Professional Development		
Benefit	**Details**	**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	May be able to help - discuss with line manager and HR.	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.