Impetus



Investment Director - Information Pack

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 Wednesday 25 November 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.



About Impetus

Impetus works to transform the education and employment outcomes of young people with experience of poverty.

We do this by using our deep expertise and high calibre networks to support the best non-profits these sectors 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 access sustained employment.

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

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



Impetus

Our Values

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 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 between them. Investment Directors line manage Investment Managers (currently 7). 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.



About this role

We believe that all young people deserve to succeed in school and in work, whatever their background. As we enter a challenging time with rising inflation and a likely recession, our work feels more vital than ever before. The role of Investment Director presents an exciting opportunity to contribute meaningfully to the portfolio partners 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.

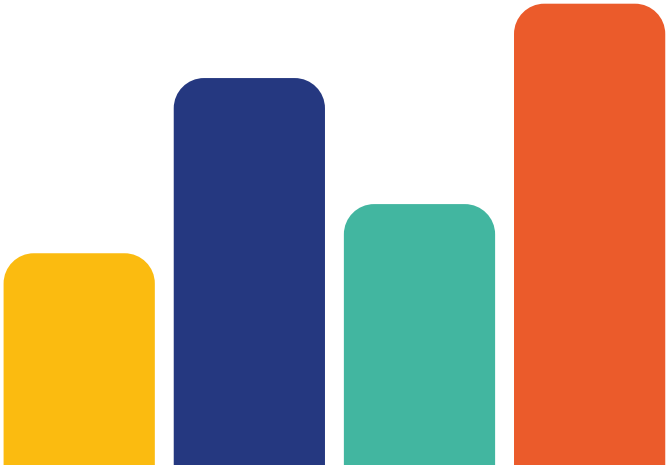
We believe the strength of our approach resides in three things:

- 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, 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 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 minority ethnic 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 funding from 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



Job description

Title:	Investment Director
Team:	Investment team
Reports to:	Sector Lead
Direct reports:	Line manages one or more Investment Managers
Salary:	£68,132 per annum plus benefits*
Grade:	3
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 moving to Clerkenwell in February 2027). 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 role's starting salary is positioned within our pay framework, which provides scope for future salary progression as individuals grow and develop in the role.*

***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.*

Key responsibilities

Supporting portfolio partners

- Providing high quality advisory support to CEOs and senior colleagues on key strategic topics, using a mix of at least monthly one-to-one meetings and group facilitation to:
    a. clarify theory of change
    b. define long term ambition
    c. develop growth strategy
    d. achieve a step change in the delivery and performance management of outcomes
    e. strengthen leadership (individual and collective) and governance capabilities
    f. develop path to scale
    g. build financial resilience
- Scoping and project managing pro bono capacity-building projects (in addition to providing direct management support). Ensure projects are delivered to a high standard and contribute to charity progression.
- Identifying engagement opportunities for our donors and supporters with portfolio partners that are aligned with the partner's activities and do not distract or undermine their core work.
- Collaborating with the Impetus Philanthropy team to support the development of additional funding opportunities for portfolio partners, enhancing their ability to deliver impact at scale.
- Effectively leveraging the support of investment managers to advance the objectives developed for each portfolio partner that is managed by an Investment Director.

Managing partnerships with portfolio partners

- Managing relationships with partner Chairs and CEOs.
- Agreeing Service Funding Agreements, including appropriate annual investment milestones to allow for a clear assessment of re-investment potential at end of phase.
- Regularly monitoring and assessing partner progress / risks against milestones and making evidence-based recommendations on progression or exit to Leads, Portfolio Director and the Investment Committee.
- Escalating key risks on performance, leadership and safeguarding.
- Conducting annual partnership reviews with Sector Leads and partner CEOs.
- Working with Impetus finance colleagues to ensure timely distribution of grant payments, in line with Service Funding Agreements.

Finding high potential charities and non-profit partners for our portfolio

- Identifying potential charitable organisations for investment.
- Leading and delivering in-depth due diligence process within the scope of a grant round, to assess and build partnership foundations with potential partners – covering leadership and governance, and their impact, scale, and partnership potential.
- Modelling from first contact of origination, our approach to engaged and trust-based investment management support.
- Developing and presenting high quality investment propositions to our Investment Committee.

Support to Impetus

- Developing expertise about "what works" in the sector through cultivation and use of expert input and engagement as well as investigation into key research and evaluative literature.
- Contributing insights and learning from portfolio work to inform Impetus' strategy, model and delivery, providing evidence based recommendations to senior colleagues.
- Contributing to internal priorities and working groups, bringing expertise and insight from portfolio work (e.g. team strategy discussions, digital improvement initiatives, or equity, diversity, and inclusion).
- Contribute towards Impetus' public affairs and philanthropy objectives through input into case studies, research and policy campaigns, donor reports and fundraising events.
- Sharing the learning from our work across the team, across the organisation and externally working within Impetus strategy and agreed forums.
- Engaging in Impetus pro bono, communications, and advocacy events, and engaging portfolio partners appropriately in these events.
- Line-manage and support one or more Investment Managers, setting clear objectives and providing coaching, feedback and development opportunities to enable them to deliver high quality work and achieve their individual, project and team goals.
- Embedding inclusive and equitable practices in portfolio work, ensuring diverse perspectives are considered and barriers to participation are identified and addressed.

Person specification

Essential

- A commitment to Impetus' mission.
- Senior level responsibility and a strong track record of building trust-based relationships with senior stakeholders, advising them on key strategic decisions, and challenging them in a respectful and collaborative manner.
- A talent for strategic thinking around complex issues.
- Strong financial acumen and analytical skills.
- Understanding of impact measurement and evaluation fundamentals.
- Resilience, tenacity and initiative.
- Ability to adapt personal style to different leadership contexts, working inclusively and effectively with diverse leaders and organisations.
- Growth mind-set to seek out and act on feedback and a commitment to continuous learning and development.
- Proven ability to work independently, and to exercise good judgment.
- Strong planning and time management skills.
- Experience contributing expertise to team or organisational priorities, including sharing learning and supporting others' development.
- Interest in partnering closely with charities that are doing what it takes to get better.
- A commitment to equity, diversity and inclusion.

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

Desirable

- Experience in the non-profit (charity or social enterprise) sector, through work, as a pro-bono volunteer or Trustee capacity.
- Experience in consulting, investment management, senior charity management, or other in-depth grant making and advisory work.
- Knowledge and expertise in UK education or youth employability sectors.
- Board experience in private, public or third sector.
- Understanding of or experience with commissioning impact evaluations.



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.



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 Wednesday 25 November 2026.

Interview

First round interviews will take place: **02, 03, 04 December 2026**.

Second round interviews will take place: **w/c 07 December**.

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 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.

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.

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.

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

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

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.