



Impetus



**Investment Manager**  
Candidate Pack - August 2022

## Impetus Investment Manager

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### Executive Summary

Impetus is driven by a shared belief in tackling the barriers that hold back young people from disadvantaged backgrounds in education and employment. We raise co-investment for our charity portfolio to build sustainability. Alongside investing extensive financial and non-financial support in our charity partners through our Investment Team we also seek to influence decision makers to implement evidence led policy and direct new resources to get young people the support they need through our Public Affairs team. We are resolutely focused on outcomes, driven by quality evidence.

The Investment Manager (IM) is a key member of the Investment Team, helping to support charities to deepen their impact and scale their outcomes. Working in partnership with Investment Directors and other Investment Managers, this role works across the organisation, working closely with our partner charities and providing internal support to the investment team.

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.

**The closing date for receipt of completed applications is Midday on Friday, 16 September 2022.**

Applications should consist of a CV accompanied by a brief covering letter addressing the criteria in the Person Specification for the position applied for.

If you would like to find out more about this role or have any questions regarding the recruitment process please contact Nicole Arnold at [nicole.arnold@society-search.com](mailto:nicole.arnold@society-search.com).



## Organisation

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 charities working with our target group of young people and committed to education and employment outcomes. Impetus provides core funding and work shoulder-to-shoulder with charity leaders, providing guidance and support to help them become stronger organisations.

In partnership with other funders, we help charities grow and we influence policy and decision makers so that all young people get the support they need.

Impetus currently has 35 members of staff, supporting 20 charities with programmes across England, Wales and Scotland.

Impetus is committed to equity and diversity in our work and our organisation - and encourages applications from candidates from minority backgrounds and/or with lived experience of the issues faced by the young people we exist to serve.

## 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.

## Role Description

**Salary:** £48,700 per annum

**Reporting to:** Investment Director

**Team:** Investment

**Location:** Central London, WC2N 4JF - including hybrid working

**Duration:** Permanent

**Working hours:** Full time (37.5 hours per week)

The Investment Manager (IM) works as an integral part of the Investment Team to help deliver our mission - supporting charities to deepen their impact and scale their outcomes. This role works closely with Investment Directors and other Investment Managers, includes 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 disadvantaged backgrounds in the UK.

The IM role works across the portfolio, with the opportunity to work with various charities and Investment Directors.

## Key Responsibilities

### *Investment management*

- Working closely with Investment Directors to support charity 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 CEO, 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;
- working with Finance teams at charity partners to develop and refine financial reporting including monthly accounts, leveraging pro-bono financial expertise where relevant.
- coaching middle managers 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 Impact strategy workshops, analysing charity impact data, developing and analysing pre-workshop surveys, developing facilitation materials, and synthesizing outputs;
- supporting Impetus' quarterly peer learning forums for our charity partners, in particular the Impact Forum. This includes relationship management with Head of Impact of charities, developing content for learning and discussion, and facilitating forum meetings
- supporting the governance of our investments, preparing reports for Investment and Steering Committees

## *Investment Team support*

- Leading on key analytical projects internally including financial / strategy modelling, analysis of financial and impact data. This includes building the model for analysis and conducting the analysis, distilling the insights and developing a compelling narrative of the key findings and implications, presenting to stakeholders;
- supporting/leading the annual cycle of identifying new investments - mapping the landscape of charities in thematic areas (e.g. Apprenticeship and Skills), identifying high potential charities through analysis of key impact and financial data and reviewing the current evidence base;
- playing 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. This includes the latest reports, evaluations, partnerships, awards, initiatives etc;
- working closely with Public Affairs team and ensure teams are integrated in their thinking and approach – both ensuring we are coordinated in our support to the sector, but also working on cross team projects that support the wider Employment and Education sectors.

## *Support to the Impetus organisation*

- Working collaboratively 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

The successful candidate will be expected to demonstrate evidence of the following skills, capabilities and experience:

### 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 client relationship management skills;
- Highly analytical and numerate, with strong command of excel with modelling capabilities. (Financial skills highly desirable but not required);
- Strong strategic thinker; able to identify key strategic insights from a range of data outputs and translate into clear communication, including PowerPoint;
- Previous experience working with charities. Could be in a previous role, pro-bono volunteer or Trustee capacity;
- 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 equality, diversity and inclusion in our work and our organisation.

### Desirable

- Experience in consulting, investment management, or other in-depth grant making and capacity building work;;
- 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.



## Appointment Details and How to Apply

Impetus is being assisted in this appointment process by the executive search firm Society.

Applications should consist of:

- 1 a concise covering letter (no longer than two pages), addressing the criteria in the Person Specification;
- 2 an up-to-date curriculum vitae;
- 3 names and contact details of three referees (although referees will only be approached at the final stage of the process, and only with your express permission).

General advice on how to write [a strong CV](#) and [a strong covering letter](#) can be found on our website.

To upload your documents via Society's website, [click here](#).

The deadline for receipt of applications is midday on Friday, 16 September 2022.

Shortlisted candidates will be invited to interview in October 2022.

An appointment will be made subject to receipt of satisfactory references. The appointed candidate will be offered a salary that is commensurate with their experience and the seniority of their new role.

We are committed to ensuring that anyone can access our application processes. This includes people with hearing, sight, mobility, and cognitive impairments. Should you require access to this document in an alternative format, wish to apply in a different format, or need any other reasonable adjustments made for you (including at interview), please contact us at [inclusion@society-search.com](mailto:inclusion@society-search.com). We also welcome suggestions or comments about any more general access improvements we should consider.

