

Job brief: Investment Manager

Title:	Investment Manager
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)
Starting date:	ASAP

About Impetus

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 works 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.

About this role

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, and 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 from 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

- Work 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.
- Build trust-based relationships with charity leaders including CEOs, delivery staff and Programme / Impact leads, to become a valued advisor on practice improvement.
- Work closely with staff at our partners charities, providing guidance, thought partnership and capacity building
 - Work with Impact teams at charity partners to develop and refine impact management practices; data collection, dashboard development, performance review meetings, programme design and evaluation
 - Work with Finance teams at charity partners to develop and refine financial reporting including monthly accounts, leveraging pro-bono financial expertise where relevant.
 - Coach middle managers to develop as leaders and help drive an impact led approach within their organisations
 - Curate 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)
- Support Investment Directors with design and delivery of Impact strategy workshops, analysing charity impact data, developing and analysing pre-workshop surveys, developing facilitation materials, coordinating logistics, and synthesizing outputs.
- Support Impetus' quarterly peer learning forums for our charity partners, in particular the Impact Forum. This includes relationship management with charities' Heads of Impact, developing content for learning and discussion, facilitating forum meetings and logistical support.

- Support the governance of our investments, preparing reports for Investment and Steering Committees and presenting our performance to committees.

Investment Team support

- Lead on key analytical projects internally including financial / strategy modelling, analysis of financial and impact data. This includes building the model for, and conducting, analysis, distilling the insights and developing a compelling narrative of the key findings and implications, and presenting to stakeholders.
- Support/Lead 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.
- Play 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 and including identifying risks. Requires strong relationship management with potential charity partners
- Developing knowledge and expertise in Education and Youth Employment and staying up to date on relevant sector developments. This includes the latest reports, evaluations, partnerships, awards, initiatives etc.
- Work 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

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

Person specification

- 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 skills, 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, and/or professional services
- 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

How to apply

Please send to recruitment@impetus.org.uk by 9am Monday 17 January 2022:

- your CV
- supporting statement (no more than two sides of A4) which addresses the criteria in the person specification and telling us why you're applying for this role

In order to complete your application please also complete the following equal opportunities monitoring form:

<https://www.surveymonkey.co.uk/r/ImpetusRecruitment-EqualOppsMonitoringForm>

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

First round interviews will take place on w/c 24 January 2022

Second round interviews will take place on w/c 31 January 2022

Due to the large number of applications we receive, it is not possible to write to you should you not be shortlisted. If you have not heard from us within three weeks of the closing date, please assume that your application has not been successful on this occasion.

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