

## Investment Manager at the Vivensa Foundation

### JOB DESCRIPTION – OVERVIEW

The Vivensa Foundation is seeking to recruit an Investment Manager, primarily to support the organisation in deploying and managing its social investment portfolio.

- **Title:** Investment Manager
- **Salary:** £60,000 per annum
- **Contract Type:** Permanent full-time (*open to part-time arrangements with a minimum requirement of 4 days a week*)
- **Location:** London with hybrid office and home-working arrangements
- **Reporting to:** Chief Investment Officer
- **Accountable to:** Chief Investment Officer, Social Investment Committee
- **Closing Date:** Friday 8<sup>th</sup> May 2026

### VIVENSA FOUNDATION - BACKGROUND

The Vivensa Foundation is the only UK-based charitable foundation with a sole focus on providing funding and support for researchers and community innovators who are working in ageing-related research or providing health and social care services.

Our vision is that everyone in the UK can age well. To achieve this, we invest in people with great ideas, research, science and methods for improving the health and well-being of older people— and in the connections and knowledge that help those ideas flourish.

As an endowed foundation, we have a responsibility to use all our resources in pursuit of our vision — not just the funding we distribute through grants. That means thinking differently about our endowment.

Over time, we are shifting towards an impact-intentional approach — where our capital works alongside our research and partnerships to support real-world change. Eventually, we want our endowment to be mission-aligned. Social Investment is a key part of this work.

In the spring of 2025, we launched our [Strategic Framework](#), values and priorities for the next five years. We have made an initial £5m commitment for social investment, with a view to reviewing and potentially expanding this. Our [Social Investment Policy](#) outlines the Foundation's ambition for this investment activity seeking to provide capital both directly to purpose-driven organisations (such as charities or social enterprises), or indirectly through investment into pooled funds which are substantially supportive of our mission.

We've made a handful of investments to date – from a commitment to a social outcomes fund, [Bridges](#), to - a direct equity investment in a homecare business, [BelleVie](#). We are now at an exciting tipping point and looking for an **Investment Manager** to help build and lead our social investment practice.

## **ROLE RESPONSIBILITIES**

The Investment Manager will primarily lead on delivering the Foundation's social investment activity, working closely with the Chief Investment Officer and supported by the Investment Associate. Specific responsibilities are outlined below:

### **Investment Processes:**

- Lead on building a pipeline of suitable social investment opportunities, including managing an open application process, and identifying mission-aligned propositions
- Guide potential investees through the investment appraisal process, providing financial advice and business planning support, where appropriate
- Lead on the due-diligence process - evaluating and assessing the financial, operational and impact aspects of social investment propositions.
- Execute investment decisions, including drafting and negotiating legal agreements with support from external legal counsel and/or other partners.
- Develop appropriate reports and tools to effectively manage the social investment portfolio, monitoring both the financial and non-financial performance, identifying suitable metrics to measure and report on an ongoing basis.
- Build effective partnerships with investees, providing support and advice, and leveraging the expertise of the Committee and wider organisation, where relevant.

### **Reporting and Governance:**

- Prepare due-diligence reports and investment recommendations for the Social Investment Committee.
- Facilitate the Social Investment Committee decision-making processes, with support from the Chair and CIO.
- Develop and produce suitable reporting information for the Board of Trustees on the progress of the social investment activity.

### **Team and Sector:**

- Provide training, guidance and support around investment due diligence processes, to support the growth and development of the Investment Associate and wider team.
- Provide support on investment, financial, operational and communication aspects across the broader organisation.
- Partner with the research team to identify aligned funding themes and investment focus areas.
- Collaborate with other foundations to support the learning and development of other organisations, sharing advice and knowledge in relevant social investor forums.

## **PERSON SPECIFICATION**

Prospective candidates should be able to demonstrate all of the required skills and experience, with a preference for those who can evidence some of the desirable attributes.

### **Required skills, experience and attributes:**

- At least 4 years' of experience in an investment or finance related role.
- Strong financial analytical and modelling skills, with an ability to assess financial statements, stress-test financial valuation models and evaluate financial performance.
- Experience in conducting due-diligence processes and preparing investment recommendations.
- Self-starter who can work independently under their own initiative and proactively seek support when required.
- Experience of working in small teams / organisations, covering a broad range of tasks and responsibilities.
- Structured thinker who can deal with complexity and distil complex information.
- Excellent written and oral communicator, with strong interpersonal skills to establish and develop relationships with investees and partners.
- Understanding of social impact evaluation, with the ability to assess and develop theory of change models and outcomes.
- Embodies the Foundation's values with an interest in supporting the organisation's mission and a passion for ageing well.

### **Desirable skills and experience:**

- Relevant professional financial qualification e.g. Chartered Accountancy (ACA / ACCA / CIMA), Chartered Financial Analyst (CFA), Chartered Alternative Investment Analyst (CAIA), etc.
- Knowledge of financial products and structures, such as repayable grants, low interest loans, outcomes-based contracts or equity investments.
- Proficient administrative skills and experience of prioritising tasks to manage workload
- Understanding of context in which modern charitable foundations work, particularly in relation to investment guidance provided by the Charity Commission
- Experience of investing directly in small-scale social or community enterprises or purpose-driven ventures, with an understanding of the legal and tax implications.
- Knowledge of delivering innovation in healthcare, social care or academic and clinical research settings.

## APPLICATION PROCESS

It's an exciting time to be joining us and we're looking for people with the commitment, vision and expertise to support and work with our small but highly experienced and professional executive team and make your contribution to writing the next chapter in our story.

If you think this could be you, please send your CV, with a covering letter of no more than two pages addressing how you meet the needs of the person specification to [jobs@vivensafoundation.org.uk](mailto:jobs@vivensafoundation.org.uk) together with the optional [Equity, Diversity and Inclusion \(EDI\) form](#). Your email header should indicate the role for which you are applying.

Our [EDI form](#) is optional and you do not have to answer any / all of the questions. However, gathering this data helps us to know if we are succeeding in involving different groups of people, and that we need to change our approach if some groups are not represented.

CVs without covering letters will not be considered. We also recognise the potential of generative AI to contribute to the creative process and we encourage its ethical and constructive use. **This includes acknowledging it whenever it is used. Therefore, please reference generative AI in your written application if you have used it.**

### EDI form

The work we fund means that we know all too well the negative impacts of inequity. We are therefore committed to promoting EDI in all areas of our work. Our EDI form is optional and you do not have to answer any / all the questions. However, gathering this data helps us to know if we are succeeding in our ambition to be inclusive, and to change our approach if some groups are not represented.

Your application will be anonymised before it is considered by the recruiting panel, and the panel will not have access to any information you have provided in our EDI form.

### Data Protection

The information you provide in your application will only be processed for the purpose of this recruitment process as described above. By applying for this role, you have consented that the data you provide will be processed and stored as described above. For more information, please read the Vivensa Foundation's Privacy Notice.

*The closing date for applications is midday on Friday 8 May 2026. Following a review process, applicants will be notified about the outcome and potential progression to the next stage by mid-May. Shortlisted candidates will be invited for interviews during May/June 2026, with the interview stage to include a case study exercise.*