

## **Senior Administrator and Case Support Worker**

**Salary:** £32,000–£34,000 per annum, including non-pensionable London Weighting Allowance of £9,231 per annum.

**Benefits:** Generous pension entitlement (20% of base salary), plus permanent health/income protection insurance and life assurance.

**Annual leave:** 27 days annual leave per annum, plus discretionary office closure days.

**Contract:** Full time (35 hrs pw)/Permanent. 4 days a week, or shorter working days, may be considered for the right candidate.

**Working hours:** Our standard office hours are 9am–5pm with a 60-minute lunch break, but we are happy to discuss a flexible working pattern.

**Location:** Hybrid. 3 days a week in newly refurbished light and spacious office at 72 Cannon Street, City of London EC4N 6AE. 2 days a week working from home.

**Reporting to:** Senior Grants and Services Caseworker

**Team:** Member of the Welfare Team (consists of Director of Welfare and Grants, Senior Grants and Services Caseworker, Caseworker, Grants Administrator, Senior Administrator and Case Support Worker)

### **About The Insurance Charity**

The Insurance Charity supports current and former employees of the insurance sector together with their dependants. Each year they help insurance people across the UK and Ireland who are encountering financial, health, housing, and wellbeing challenges.

The Insurance Charity has been providing support to the Insurance profession since 1902. You will be joining us at an exciting time. Our strategic aim is to increase the amount of support we provide to beneficiaries, both in terms of the number of applicants we support, and the overall financial amount we award. We are able to do this in a very flexible way – tailoring our support to people’s needs, whether that is one-off help for a specific need, or ongoing support to see them through a difficult period. We do not have a fixed limit on the financial support we can provide to an individual. In the last year we provided over £1.3m of financial assistance to individuals in the UK and Ireland. With a supportive board of trustees, we have many opportunities to develop and grow our work.

Our team is keen to implement new partnerships to support our beneficiaries, and to develop our systems, processes and policies to continue to offer our beneficiaries a smooth, efficient and fair outcome for their case.

This role is opening up due to retirement of a long-serving team member. We are committed to helping our team members grow and develop. We encourage team members to keep up to date through full participation in Association of Charitable Organisation events, and other relevant training.

### **About You**

You will be a highly organised and approachable administrator who enjoys supporting both colleagues and applicants. As the first point of contact for many enquiries, you will communicate in a friendly, clear and empathetic way, ensuring applicants feel supported and understand the Charity's processes. You will be confident handling phone calls, emails and new enquiries, while maintaining accurate records and database entries.

You will have strong digital and organisational skills, with experience using databases and Microsoft 365 tools to manage information, prepare documentation and support reporting. With excellent attention to detail, you will help ensure systems, records and communications are accurate and up to date.

A collaborative team player, you will take a proactive and flexible approach to supporting the Welfare Team, assisting with case administration, grant processes, committee preparation and wider organisational tasks. Above all, you will bring a compassionate and non-judgmental approach when working with people who may be experiencing challenging circumstances.

### **Key Responsibilities**

#### **Applicant Enquiries and First Contact**

- Act as a friendly and understanding first point of contact for applicants via phone and email.
- Undertake initial checks on new applicants and create database records.
- Follow up with applicants to encourage them to continue their application and explain the Charity's processes and available support.

#### **Casework and Administrative Support**

- Allocate new cases and requests from existing beneficiaries across the casework team and monitor caseload levels.
- Assist caseworkers by following up with applicants for documentation where required.

- Update databases and filing systems when support is approved or cases conclude, including creating case summaries.
- Prepare payment authorisations, internal payment requests and send grant award decision letters.

### **Database, Data and Reporting**

- Maintain and update the Charity's database, ensuring records are accurate and up to date.
- Support projects to improve database functionality.
- Extract data and produce reports to support the work of the Welfare Team and organisational reporting.

### **Grants and Programme Administration**

- Prepare papers and folders for Grants Committee meetings and maintain records of committee decisions.
- Support the administration of ad hoc grant programmes.
- Assist Senior Grants and Services Caseworker with administration of The Insurance Charity's partnerships with other support organisations (e.g. employability, money advice, housing organisations) and suppliers – maintain records of individual cases referred and track progress, assist with invoices and contracts, assist with evaluation of effectiveness of partnerships.

### **Beneficiary and Volunteer Support**

- Send feedback surveys to applicants and beneficiaries and share findings internally.
- Identify potential case studies and liaise with the Marketing Manager where appropriate.
- Manage the application process for volunteer visitors, including documentation and DBS checks.
- Coordinate additional engagement with beneficiaries, such as annual gifts and milestone birthday cards.

### **Team and Organisational Support**

- Arrange Welfare Team meetings and events, including agendas and minutes.
- Provide administrative support to the Director of Welfare and Grants, CEO and wider organisation as required

## **Person Specification**

### **Essential**

- Strong interpersonal skills
- Strong digital skills
- Fully competent using Microsoft suite of applications (Word, Excel, Outlook, Powerpoint, Teams)
- Good writing skills and attention to detail
- Strong organisational skills with efficient and methodical approach to work and time management
- Experience maintaining accurate records and systems
- Strong expertise using databases
- Empathetic and non-judgmental approach
- Confident dealing with people on phone, video call and by email
- A strong team player who can flex priorities to support colleagues when needed.

### **Desirable**

- Experience of working with people with complex and diverse needs
- Experience of supporting implementation of a change programme.
- Previous experience in charitable sector desirable, but not required

### **HOW TO APPLY**

- Please send a CV and cover letter outlining how you meet the full criteria and why you'd be interested in the role to: [lizzy.clark@harrishill.co.uk](mailto:lizzy.clark@harrishill.co.uk)
- Closing date: **Applications are being reviewed on a rolling basis so please submit your application asap and before 6/4/26**
- First Interviews: **9<sup>th</sup>/10<sup>th</sup> April**
- Second Interviews: **15<sup>th</sup>/16<sup>th</sup> April**