

Grants and Services Caseworker

Salary: £36,000–£38,000 pa, including London weighting allowance of £9,231 pa pro rata

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 pro-rata, plus discretionary office closure days.

Contract: Full-time permanent role. 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: Director of Welfare and Grants (primary line manager), with dotted line to Senior Grants and Services Caseworker (project supervisor)

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

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 an experienced grants officer or caseworker to individuals, with a good understanding of financial hardship and the challenges individuals may face. You will be confident assessing applications against eligibility criteria, analysing financial information, and making recommendations for financial support. An up-to-date knowledge of UK state benefits and the ability to provide guidance or signpost individuals to relevant services is essential.

You will be organised and able to manage a varied caseload, projects and administrative tasks - maintaining accurate records and using digital systems effectively, including Microsoft 365 and case management databases. With excellent written and interpersonal communication skills, you will produce clear case recommendations and work collaboratively with colleagues. You will have strong project and administrative skills and be able to support wider departmental programmes, projects and processes.

Above all, you will demonstrate empathy, sound judgement, and a non-judgmental approach when working with people experiencing complex or challenging circumstances, ensuring all interactions are supportive, respectful, and confidential.

Key Responsibilities

Grant-making and Casework:

- Assess and process applications in line with the Charity's grant-making policies and eligibility criteria, with particular responsibility for the Charity's longer-term beneficiaries

- Act as a friendly and understanding point of contact for applicants and existing beneficiaries via phone, video and email
- Undertake initial checks on new applicants, introductory phone calls to explain the Charity's processes and available support, follow up with applicants to obtain the required information and to encourage them to continue their application
- Analyse information against criteria, interpret financial information and ensure all relevant information is obtained
- Conduct needs assessments to understand applicants' circumstances, including phone calls and video calls with applicants
- Make recommendations on financial assistance under delegated authority powers and prepare recommendations for our Grants Committee's consideration for more complex or higher value grants.
- Provide advice on benefits, housing, debt, employment, and other relevant issues.
- Signpost to relevant resources and organisations, including The Insurance Charity partners, to coordinate support.
- Undertake reviews of ongoing cases and recommend whether to continue support or conclude the case.
- Ensure all communications with beneficiaries are personalised, reflective and demonstrate empathy and an understanding of individual circumstances.
- Take a proactive role in ensuring grant-making policies and processes are up to date.
- Maintain detailed, up to date and accurate case and financial records on the Charity's database and systems, logging data received, and actions taken in line with current policies and procedures.
- Maintain confidentiality in all areas of the role, in line with procedures and data protection.
- Monitor outcomes and contribute to impact reporting.
- Uphold safeguarding, equality, and data protection standards at all times.

Welfare Team programmes, projects and processes:

- Assist Director of Welfare and Grants to prepare papers and folders for Grants Committee meetings, maintain records of committee decisions and undertake post-committee administration
- Work with the Director of Welfare and Grants and the Senior Grants and Services Caseworker to support the set-up, assessment, administration and evaluation of ad hoc grant programmes

- Assist Senior Grants and Services Caseworker with management 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.
- Work with Director of Welfare and Grants and Senior Grants and Services Caseworker to support projects to improve operational efficiency and processes, including improved database functionality and data reporting
- Any other duties that may be reasonably required.

Person Specification

Essential

- Experience in a Grants Officer/Caseworker role in a grant-making charity to individuals
- Up to date, working knowledge of UK state benefits.
- Good understanding of financial hardship issues and awareness of organisations and services that can provide help with issues that beneficiaries might experience.
- Ability to manage a complex workload and adapt to changing priorities.
- An organised methodical approach to work and time management.
- Strong digital skills, including Excel and Word skills.
- Proficiency in using digital tools and case management systems/databases.
- Excellent communication and interpersonal skills.
- Strong written skills and mathematical capability.
- Data analysis and insight skills.
- High emotional intelligence and excellent decision-making - empathy, good listening skills, resilience and a non-judgmental approach.
- Experience of working with people with complex and diverse needs
- Fully competent using Microsoft suite of applications including Teams, 365 and Sharepoint.
- A strong team player who can flex priorities to support colleagues when needed.

Desirable

- Desire to develop career in small team where roles are defined and each person responsible for workload

- Experience of managing small, discrete projects or grant programmes
- Experience of supporting implementation of a change programme
- Knowledge of Irish state benefits.

How to apply

Please send a CV and cover letter outlining how you meet the full criteria and why you would be interested in this role to: vicky@theinsurancecharity.org.uk

Closing date: Monday 29 June

First round interviews: Thursday 9 July

Second round interviews: Wednesday 15 July

Interviews will take place at our offices at 72 Cannon Street, London EC4N 6AE