



EARLY YEARS ALLIANCE  
50 FEATHERSTONE STREET LONDON EC1Y  
8RT

Registered as an Educational  
Charity

**JOB DESCRIPTION**

**JOB TITLE:** Insurance and Memberships Adviser  
**DEPARTMENT:** Memberships and Customer Service  
**RESPONSIBLE TO:** Insurance and Memberships Manager

---

**JOB PURPOSE:** To provide excellent customer service and information to our Members. To promote various products and services. To actively support insurance and membership recruitment, retention and engagement.

---

**SAFEGUARDING REQUIREMENT:**

The Early Years Alliance is committed to safeguard and promote the welfare of children and young people. It is a requirement of all staff that they share this commitment and follow the prescribed policy and procedures to continuously promote a culture of safeguarding across the whole organisation.

---

**MAIN DUTIES:**

1. Answering calls from our members on matters relating to membership, insurance or general organisation related queries.
2. The adviser will need to handle informal (first stage) complaints as part of customer service. As such, they would need to have some experience of how to handle difficult and angry customers.
3. Provide excellent, up to date accurate information and customer service to all Early Years Members, potential members, local authorities, regulatory bodies or members of the public that may contact us.
4. Assist in the day-to-day administration of all insurance related queries, this could include processing renewals, new business, taking payment, providing official documentation and answering queries regarding insurance.
5. Using the Customer Relationship Management system (Microsoft Dynamics) to track all correspondence with members and new business, including logging phone calls and emails. Use the system to create necessary reports when required.
6. To handle a broad range of enquiries on early years care and education, by telephone and email, and to ensure a high standard of service is provided in line with our customer care competencies.
7. To keep up to date with developments relating to early years care and education

and to maintain a resource to be shared with the team.

8. To actively promote the membership scheme by assisting with the Membership Strategy, attending national events and exhibitions and by identifying gaps in the service and providing feedback to your line manager.
9. To identify cost effective ways in which to promote Alliance products and services and assist in the development and implementation of the membership retention and recruitment strategy.
10. Arrange the dispatch of publication and information materials.
11. Provide assistance with regards to members' voting rights in preparation for the AGM.
12. To identify issues, through your contact with enquirers, that require editorial in Under Five and the Internet/Intranet, and feedback to your line manager.
13. To assist the team in developing and ensuring leaflets and information sources online are kept up to date.
14. To assist in opening and logging incoming and outgoing mail for the section and to carry out other general duties, including filing, photocopying, scanning etc.

### **General Duties**

1. To attend meetings as directed.
2. To attend in-service training as directed.

### **EQUALITIES:**

The post-holder must be aware of and respect differences and ensure that children have equality of access to opportunities to learn and develop. S/he must have an understanding of and commitment to equality of opportunity and anti- racism issues.

### **POLICIES AND PROCEDURES:**

The post-holder must be aware of and comply with all the charity's policies and procedures including those relating to child protection, confidentiality and data protection, health & safety and security, bribery and corruption, signing agreement and contracts and financial.

*This job description is not an exhaustive list of duties, and you will also be required to carry out any other duties which may reasonably be required of you in accordance with the needs of the Early Years Alliance. You are also required to be flexible and adaptable with respect to your role.*

---

### **PERSON SPECIFICATION:**

#### **Essential Criteria**

- 1) Knowledge of general insurance and an understanding of the principles and practices of insurance.

- 2) Excellent customer service approach.
- 3) Good written and verbal communication skills.
- 4) Proven ability to meet tight deadlines.
- 5) A methodical approach to tasks.
- 6) Ability to prioritise the daily workload.
- 7) Experience of using Microsoft Office.

**Desirable Criteria**

1. Experience of working within the Early Years sector.
2. Knowledge of a Customer Relationship Management System.

**TERMS & CONDITIONS:**

Grade: 3A  
 Salary range: £23,872 - £26,987 per annum  
 Allowances: £2,570 per annum LWA  
 Hours: 35 per week  
 Working location: 50 Featherstone Street, London.  
 Flexibility regarding working from home, with required days in the office. Flexibility is subject to business needs.

This post is exempt from the Rehabilitation of Offenders Act (1974) and does not require a Disclosure and Barring Service check. Applicants must be prepared to disclose any convictions they may have and any orders which have been made against them. The level of this check is enhanced.

**Pension:** The table below shows what the base contributions are, and the dates they will rise. You can also choose to give more than the minimum amount should you wish.

Date effective	Employer minimum contribution	Employee minimum contribution	Total minimum contribution
6 April 2018 to 5 April 2019	2%	3%	5%
6 April 2019 onwards	3%	5%	8%

**JOB DESCRIPTION SIGN OFF**

Date issued by Manager:

Name:

Signature:



I confirm that I have received a copy of this job description and have had any questions about it answered.

Name of post holder:

Signature:

Date: