

Role profile

Role title	Pensions Analysis Lead
Department and directorate	National Negotiation and Representation
Grade	4
Reports to (job title)	Head of Research
Direct reports (job titles)	None

Job Overview— purpose of the role

Describe as concisely as possible the overall purpose of the job and what success looks like. Please limit this to a maximum of four or five sentences

To provide advice and guidance on BMA positions on pensions, pay and pension taxation.

Duties and Responsibilities

What are the core duties/responsibilities required to be performed in the role. (e.g., to provide a full range of administrative support services to the department including x,y,z)

Please provide a bullet point list

- Providing advice and guidance on BMA position, policy and negotiation in relation to pension and pension taxation matters
- Maintaining a high level of knowledge and awareness of the pay and negotiation issues within NNR
- Supporting the BMA Pensions Committee at various internal forums e.g. providing pensions and pension taxation advice/guidance to other branches of practice during new contract negotiations or on external review groups where we try to protect/enhance our members position
- To work alongside elected representatives in representing the BMA at various external forums such as meetings with the DHSC, the Scheme Advisory Board (England and Wales) and Devolved Nation equivalents as required
- To liaise with the relevant directorates and departments of the BMA and branches of practice on pension issues which will affect the membership
- Ability to model pensions issues to demonstrate impact of policy changes
- Secondary to the requirements of the Pensions Committee, to work with research colleagues to develop pay models either relating to pensions or not in line with the workplans of the BoP's across the UK nations
- To work with the Head of Research and other research colleagues to ensure pensions related research is coordinated with other research activities across the BMA
- Any other duties as reasonably requested

Skill (level and breadth of application)

What relevant experience is necessary to undertake this role? What specialist, technical or professional qualifications are required to be able to perform the job?

How far does the role extend out across the organisation, eg confined to own team, involves co-ordination with another department or requires regular negotiation with many other parts of the organisation. Why is this necessary? Describe the range of issues that are involved in this, eg resolving people's IT problems, collecting information on key research items or advising members on a particular issue.

- Excellent knowledge of the NHS and other relevant pension schemes/regulations/taxation
- Ability to communicate complex information in a clear and concise manner to members
- An excellent level of Excel ability and a track record of high-quality quantitative analysis
- Experience of negotiating / bargaining

Intellectual demands (complexity and challenge)

What sorts of problems, situations or issues are typically dealt with? Give any illustrative examples. How are the problems, situations or issues dealt with (eg undertaking original research and analysis or seeking specialist advice)?

To what extent are standard procedures and processes followed when undertaking typical tasks, and how is personal initiative used when solving problems? To what extent is creativity used in solving the problems (eg adopting different approaches, trying things that have not been done before within the organisation or improving/changing previous approaches).

- Writing briefings and making presentations to members conveying complex information in an understandable way
- Responding to consultations on complex pensions, pay and taxation issues
- Working with relevant BMA departments on lobbying government on pension-related matters
- Developing case studies / examples etc to inform negotiating positions
- Conducting quantitative analysis to inform negotiating positions and impact of policy changes
- Working with the Communications and Public Affairs teams to check technical accuracy of public facing documents / statements
- Working with Member Relations to understand member needs in relation to pensions and pay

Judgement (independence and level and impact limitations)

What are the typical decisions that are made in the job without reference to any higher authority? What informs/constrains the decisions (eg expenditure limits, have to follow clearly laid down procedures or working within broad objectives). What influence upon policy, procedures or resources is there (eg giving advice to others)?

Who (or what) is next to be affected by the decisions that are made – for example, supervisor sees them before they leave the team or the whole department sees and has to respond to the change that is made. Give typical example(s) of the consequences of the decisions (eg what impact does the decision-making have on the performance of the team/section/department/organisation)?

- Works closely with the Pensions Committee Officers and secretariat to provide analysis and other services to members and BMA departments – liaising with external sources and research colleagues when required
- Often work on their own initiative when involved in policy and project work and will prepare discussion papers and drafts which are circulated for comment when necessary
- Decisions taken will reflect the policy of the BMA Pensions Committee and wider BMA policy
- Working with the Head of Research to plan and organise workload
- Considers emerging policy announcements and external changes and identifies a strategy to deal with any anticipated changes
- Working with other researchers across the wider BMA, and particularly within NNR to develop coherent methodologies and consistent datasets to support accurate analysis

Use of resources (supervision of resources and influence)

What responsibility is there for managing people, equipment, budgets, resources, customer's welfare or confidential information? If this is a staff management role describe what is involved, eg staff reporting, staff development, appraisal, leading a department or the allocation of work.

How does the role fit within the organisation, eg support role, team member, team leader, specialist policy adviser, or leading major areas of core business?

- Supporting the Pensions Committee
- Treating information and information surrounding policy positions as highly confidential
- While there is no overarching budgetary or managerial responsibility, there is involvement in drafting business cases for approval
- The post holder is required to keep abreast of developing policy and also to highlight issues emerging from members for policy consideration

Communication (level, internal and external demands and significance)

*What people are typically contacted (regardless of the medium) **inside** the Association, eg immediate colleagues, senior managers or administrators? Committee members are the only members classed as internal communication. Normal non-committee membership and doctors are external (see below)*

*Who is in regular contact with the role holder **outside** of the Association, eg members who are not committee members, suppliers, members of the public? Approximately what percentage of the time is spent on external communications?*

What is the purpose of these contacts, eg conveying information, gathering data?

- Acts as a source of advice and guidance to the BMA on issues affecting pensions for all branches of practice
- Key internal contacts will include Pensions Committee officers, Branch of Practice Chairs, relevant colleagues across a range of departments including Communications, Pay & Contracts, Pensions Department, Legal, MR and others
- Key external contacts will include relevant civil servants, other trade unions and the NHS Pensions Agency
- Contacts will be used for sharing of information, influencing and exploring potential solutions to pension policy issues
- Ability to influence highly articulate and challenging individuals, using expertise, tact and diplomacy

Physical demands & coordination (physical effort and mental strain)

Are there any unusual physical or mental demands of the role; for example, lifting heavy objects, standing for long periods, using VDUs extensively or high levels of concentration?

- Extensive VDU / computer / laptop usage
- Normal co-ordination or physical demands associated with an office environment, limited requirement to engage in lifting/carrying/other exertion
- Home and office working

Working conditions and emotional demands)

What are the environmental conditions in which the work is conducted, the social and emotional demands faced by the role and the pressures resulting from these?

- The job is conducted in a hybrid environment with a mixture of home and office working and is not exposed to hazardous conditions or anti-social behaviour. The role contains minimal personal risk
- Occasional visits to other sites

Values and behaviours

The post-holder is expected to execute their role in line with our five organisational values.

The following examples illustrate how we are using our values to inform how we act:

We are **leaders** because:

- We strive to always improve
- We take responsibility for our actions
- We collaborate with each other and work as one BMA for the good of our members
- We are proactive and prepared to guide our members and each other

We are **experts** because:

- We understand our members
- We draw on our collective experience and knowledge to solve problems
- We use our insights and research to make decisions
- We provide accurate, credible, relevant and engaging information
- We recognise our strengths and act upon them

We are **committed** because:

- We listen to our members and put them at the heart of everything we do
- We are respectful, inclusive, open and honest with our members and each other
- We approach everything we do with confidence and sensitivity

We are **reliable** because:

- We deliver on what we say we will do
- We are accessible and approachable
- We build trust by being consistent and supportive
- We are positive and decisive whatever the situation

We are **challenging** because:

- We fight, ethically and fearlessly, for the interests of all our members
- We work as a brave, assertive and effective champion for high quality health services and the advancement of the profession

Sign-off

Manager:

Date:

Role holder:

Date: