

Role profile

Role title	Principal Pensions Officer
Job level	Manager
Directorate	Organising and Representation
Team	National Member Services
BMA Grade	4
Location	Homeworker
Decision Making level	Mid
Budget responsibility (Y/N)	N
Reports to (job title)	Pensions Manager
Direct reports	Pensions Officer

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***

All colleagues are expected to align their work with the organisation's corporate strategy, ensuring their decisions, priorities and ways of working actively contribute to our long-term goals and strategic outcomes.

To provide expert highly complex pension advice, guidance, and support via post/email/telephone/visit and to convey it in a way which can be easily understood by BMA members.

To line manage, support and develop designated Pensions Officer(s) as required.

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

- Present highly complex information to large group of members at Pre-Retirement Seminars and other meetings
- Communicate tactfully and diplomatically with relevant third parties and external organisations to try to resolve complex pension issues.

Duties and Responsibilities

- Maintain a high level of knowledge of highly complex regulations governing the NHS Pension Scheme, other pension arrangements and tax regulations
- Provide technical expertise and training to other BMA departments/regions
- Respond to webform enquiries, emails and telephone calls from members and maintain comprehensive and accurate files for ongoing cases. This includes concisely transcribing calls from members.
- Challenge the pensions agencies on behalf of members on rules or processes which have been incorrectly implemented.
- Highlight issues of wider relevance to the membership and/or O&R team or issues which the Pensions Committee may wish to address.
- Assist with training of newer colleagues
- To create/update web guidance for BMA members and to post web articles conveying highly complex pension regulations of the NHS Pension Scheme to be easily understood by non-pension specialists.
- To represent and protect members interests at various review groups.
- Line manage designated Pensions Officer(s), including being responsible for leave planning and authorisation to ensure adequate cover is available in the area at all times.
- Provide clear leadership to the Pensions Officer(s) by assisting with initial training and induction for new starts, setting their objectives, monitoring performance, and conducting regular reviews to support and enable staff development.
- Working as part of the Pensions team, provide cover for colleagues leave where required
- Any other duties as reasonably directed

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.

- Comprehensive knowledge of the complex regulations of the NHS Pension Scheme in particular and other pension regulations in general
- Excellent written and verbal communication skills, including tact and diplomacy. Communicating with BMA members, Regional Services and a variety of external organisations
- Excellent Presentation skills and the ability to present complex pension regulations to non-pension specialists
- Analyse complex pension information in order to check complex pension calculations
- Accuracy and an eye for detail in own work and in checking the work of others
- Team working and knowledge sharing - identifying areas to improve services and propose changes to policies and practices as new regulations come into effect
- Negotiating skills - represent the BMA at external review groups
- Ability to assess wider impact of issues
- The role holder may manage others with technical expertise.

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).

- The role holder will undertake a high level of interpretive thinking within the same or similar disciplines applied to problems which lie outside previous experience and precedents.
- The role holder will develop new policies/procedures based on advice and expertise and will bring previous experience and knowledge from other organisations to the BMA. This includes taking responsibility for production of guidance/newsletters/FAQs using research skills to draft and update guidance notes/newsletters/FAQs for members
- The role holder will resolve problems by carrying out routine analysis, generally against known criteria and typically within one field of learning. At times problems at this level either extend beyond one field of learning or require considerable research and analysis.
- Ability to negotiate the issue at hand and to succinctly present it in writing or verbally to 3rd parties
- Ability to understand technical pensions legislation

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)?

- The role holder sets operational objectives and targets for others to deliver against.
- The role holder has significant authority and autonomy within their scope of work however, refers to higher authority judgements and decisions on matters that fall outside own functional authority.
- The role holder's advice and decisions extend to other departments before being checked or reviewed and will tend to concern important issues. The advice and decisions made will have an impact across the Association
- The role holder will act on behalf of members in respect of complex pension queries and appeals where the outcome may have an impact not only on the individual member but on wider scheme membership
- The role holder can be required to use judgement and initiative to make changes without reference to a BMA senior manager and others will be required to change as a result of their action

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?

- The role holder has responsibility for monitoring, developing and reporting on the performance of others or for the integrity of specialist operational advice usually given at a more senior level.
- The role holder will have responsibility for the annual operational performance of a section/team **or** for the integrity of specialist strategic advice.
- The role holder will have line management responsibility for delivering a noticeable part of the Association's operational output **or** a specialist role that is responsible for providing operational advice that can have indirect but significant effects on the results of the Association.

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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 regularly 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?

- The role holder will communicate across management levels & will have some communication with Directors and Senior Leaders.
- The role holder will communicate with third parties and external organisations such as the NHS Pensions Agency and HM Revenue and Customs in respect of complex pension queries.
- The role holder will provide explanations on complex matters, translating these into instructions for independent action through others.
- The role holder will influence and negotiate with others particularly a more senior audience. Negotiation in this context is negotiation by the role holder and not general BMA negotiations.
- The role holder will have significant amount of external communication typically with members, customers, suppliers and members of the public.
- Excellent communication skills required to handle calls that can be difficult or emotional (e.g. terminal illness or death in services cases)
- The role holder will produce web content, guidance and newsletters for members and other departments

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?

Physical demands & coordination (physical effort and mental strain)

- There will be normal physical demands typically associated with an office environment and there may be limited requirement to engage in lifting/carrying or other exertion using specialist equipment. There will be a requirement to use technology and systems as provided or as recommended by the BMA.
- The role holder may be required to travel in order to carry out the role, in line with BMA policy. Attendance at meetings at a variety of locations (e.g. hospitals & trusts) could be required.

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?

- There are internal health & safety policies and guidance to be followed and adhered by the role holder and their direct reports (if line management is part of the role). These policies apply both in the normal office environment and also when visiting other locations in the execution of duties.
- The job is typically conducted either in a normal office (including home office) environment or external location as required to carry out the role and is not considered to be exposed to hazardous conditions or extreme anti-social behaviour (which should be reported through the appropriate internal channels).
- There may be times where the role holder is involved with a case/member contact that involves challenging situations. Concerns must be raised through the appropriate internal channels to ensure support is given to the role holder as required.

Values and behaviours

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

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

We Campaign, Organise and Represent

- We win positive changes at work and in wider society
- We are the trusted collective voice of our profession, seeking progress for doctors, medical students, our patients and populations

We are accountable and member-led

- Our representatives and staff work in partnership for and on behalf of our members
- We are open and democratic

We are expert and trusted

- We grow professional communities of practice to provide credible information, guidance and support
- We use our influence to champion advancement, innovation and professional development for the benefit of health and society

We find strength in unity and celebrate our diversity

- We seek to be fair and just, and foster respectful discussion of our differing (potentially conflicting) perspectives and contributions
- We fight prejudice and discrimination of all kinds
- We are committed to creating a culture that is inclusive of all members and staff
- We extend solidarity to each other and other groups

Sign-off	
Manager:	Date:
Role holder:	Date: