

Role profile

Role title	Principal Pensions Officer
Department and directorate	Pensions, Member Relations
Grade	Grade 4
Reports to (job title)	Pensions Manager
Direct reports (job titles)	

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

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
- To communicate tactfully and diplomatically with relevant third parties and external organisations to try to resolve complex pension issues.
- To maintain a high level of knowledge of highly complex regulations governing the NHS Pension Scheme, other pension arrangements and tax regulations
- To provide technical expertise and training to other BMA departments/regions
- To respond to emails from members and maintain files for ongoing cases
- To respond to phone calls from members and concisely transcribe them.
- To challenge the pensions agencies on rules we believe have been incorrectly implemented.
- To highlight issues of wider relevance to the membership 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.
- 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

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).

- Responding to queries drawing on own knowledge, experience and research skills.
- Ability to see wider impact and implications of pursuing any given pensions problem in case it causes greater problems for a larger group than it solves
- Taking responsibility for production of guidance/newsletters/FAQs using research skills to draft and update guidance notes/newsletters/FAQs for members
- Assimilate, research and analyse new pension/tax regulations in order to make them easily understood to members
- 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)?

Judgement (independence and level and impact limitations)

- Works autonomously, without supervision and on own initiative. Decide on appropriate courses of action to resolve queries
- Acting 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
- Liaison with other department may be necessary when pursuing cases to Ombudsman level e.g. Legal Department input

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?

- Sole responsibility for managing members case – dealing with confidential and sometimes sensitive information
- Strong supportive role to Pension Officers in the department sharing knowledge and identifying areas to improve services.
- A specialist within the BMA and the first point of contact for specialist pension advice to other BMA Department's and to keep other departments updated in respect of any pension regulation changes

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?

- Excellent communication skills - as some members may be aggressive, or calls can be emotional e.g terminal ill health or death cases
- Acts as a source of advice provide guidance to members and colleagues on all pension queries
- Communicate with third parties and external organisations such as the NHS Pensions Agency and HM Revenue and Customs in respect of complex pension queries
- Represents the BMA at external meetings where appropriate
- 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?

- Normal co-ordination or physical demands associated with an office environment, limited requirement to engage in lifting/carrying/other exertion.

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 normal home/ office environment and is not exposed to hazardous conditions or anti-social behaviour
- The role contains minimal personal risk
- Occasional visits to other regions to deliver talks
- Some members can be aggressive or calls can be emotional e.g. terminal ill health or death cases

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: