

Role profile

Role title	Pensions Officer
Department and directorate	Member Relations
Grade	Grade 6
Reports to (job title)	Pensions Manager
Direct reports (job titles)	N/A

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

Timely response to member queries on their occupational pension, mainly the NHS pension in the nations.
 Liaising with 3rd parties such as pensions agencies, PCSE, and the Pensions Ombudsman to resolve issues on members behalf.
 Identifying issues affecting members to be alerted to the Pensions Committee to ensure promotion and protection of member interests.
 Keeping abreast of the pensions schemes changes and of current pensions taxation rules as applicable in all nations and to assist in updating web guidance.
 Prioritising supporting members during stressful times such as ill health, terminal ill health and assisting bereaved families with entitlements.

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

- Provide clear and comprehensive responses to member queries on the NHS pension and other public sector pension schemes, anticipating questions not asked which are pertinent to the pensions issue at hand. Responses can be in writing or verbally by phone.
- Promoting member interests with 3rd parties and advocating for members to ensure pension rules are applied correctly.
- Manage and prioritise own workload to ensure deadlines are adhered to and urgent cases are dealt with efficiently. Maintaining brought forwards to ensure 3rd parties are chased and cases progress.
- Team working within the department to ensure knowledge is shared and to support other BMA departments who raise pensions queries with us.
- Ensuring web guidance is accurate, comprehensive and avoids jargon.
- Ability to deal with often heavy case loads and demanding members.

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.

- Knowledge of NHS and public sector pension schemes. Excellent written and verbal communication skills.
- Interpersonal skills to build relations with 3rd parties to promote speedy resolution of member queries. Members are often stressed about their finances/health and need to feel understood and supported.
- Issues often cross into employment matters e.g. partial retirement and recycling policies so close working with EAs needed.

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).

- An eye for detail to enable records to be accurately reviewed to ensure no periods are missing.
- Ability to undertake complex calculations to ensure benefits are paid correctly. These are often time consuming calculations involving different schemes (1995/2008/2015) and different types of benefits within the schemes (practitioner and officer).
- Independent working but with an awareness of own limitations and when to seek support from colleagues. Ability to research and source information on areas which are not routine, drawing on a number of information sources.

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)?

- Ability to identify issues that may affect wider groups/policy decision and alert the department to them. Ability to work off own initiative in progressing case work with third parties. Working with limited day to day supervision setting own priorities and ensuring any deadlines are met. Identifying areas of service improvement and suggesting solutions for decision by manager.
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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?

POs deal with confidential/sensitive information. POs are the majority of the Pensions Department team and support PPO and Department Manager with a significant case load.

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?

- Majority of the time is spent in external communication with members and 3rd parties. Purpose of the contact is to pursue member cases and ensure records/service/pensionable pay details are correct. Regular contact with line manager and colleagues and with EAs who may be involved in issues like partial retirement. Regular contact with pensions agencies and PCSE.
- Occasional contact with other BMA departments to provide guidance to progress projects.

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 a home office environment. Limited requirement to engage in lifting/carrying or other exertions. High level use of VDU equipment.
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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 role is home working with the need to be able to cope with all that entails.
- Occasional visits to other areas for meetings or manning stands at events. POs will deal with a lot of ill health retirement/terminal ill health retirement and the bereaved families in addressing pension and benefit queries. Reading personal medical notes and statements to support appeals for benefits can be emotionally draining and some members in these difficult times will use the PO as a crutch and make frequent contact and need more support than others.

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: