Role profile

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| **Role title** | **Data Executive** |
| **Department and directorate** | **Membership** |
| **Grade** |  |
| **Reports to (job title)** | **Head of Membership** |

| ***Job Overview– purpose of the role*** |
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| *Describe as concisely as possible the overall purpose of the job and what success looks like.* |

Responsible for the day to day management of data within the BMA Member Master database providing data and analysis to the different areas of the business while also working with external sources to ensure master data accurately reflects the NHS structure. Required to closely monitor data quality within the database and identify opportunities to make improvements which will benefit our members.

| ***Duties and Responsibilities*** |
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| *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)* |

* To regularly run and process data quality reports in Microsoft Dynamics CRM
* Manage inbound membership data changes and reply to members via email.
* To assist in the completion of data validation tasks on a monthly basis.
* Research and analyse a variety of data sources which will include public and NHS data. There will also be a need to use member and non-member information to maintain data.
* To work across multiple systems to ensure data quality in integration
* To assist with other data quality and validation issues facing the department, as required.
* To ensure compliance with a range of policies, including data protection, membership subscription, etc.
* Be a point of contact for resolving enquiries, investigating issues and responding as necessary for:
  + Legislative and eligibility enquiries to/from employers
  + Miscellaneous ballot related enquiries from members/employers
* Co-ordinate and liaise with other departments and external agencies as required
* System user acceptance testing of IT system changes for data changes.
* Through analysis, identify and highlight initial and continuing trends, escalating/reporting as necessary
* Maintain integrity and quality of information, liaising with other departments as necessary
* Co-ordinate daily, weekly, monthly, ad hoc and bespoke statistical reports as required
* Accurately manage master record of information/data capture work for audit purposes
* Ad hoc and bespoke project work
* Output directly impacts and influences Industrial Action (IA) related balloting and action – accurate and timely information reporting is essential to successful balloting/IA, minimising risk of legislative challenge and supporting all ballot related activities. Typical tasks will include:
* Research, collation and analysis of information to create, maintain and interpret structural relationships and hierarchies and include in ad hoc and bespoke reports
* Advising on information requirements and best use of information
* Bespoke training of other BMA staff in reporting tool and report usage
* Support MDG activities as necessary

| **Skill (level and breadth of application)** |
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| *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.* |

* Demonstrable experience in a similar role, with very good research, analysis and reporting skills
* IT literate, with high level knowledge of Microsoft Dynamics CRM system and developing knowledge of data/information analysis and reporting, MI/BI reporting, Proficiency with Microsoft Excel and application of database management
* Good knowledge of data management legislation and compliance
* Strong knowledge of BMA, including structure, policy and procedures
* An understanding of NHS and medical employment structures, relationships and hierarchies would be of benefit but not essential.
* Effective written and verbal communication skills
* Customer Services skills

| **Intellectual demands (complexity and challenge)** |
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| *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).* |

* Actively manage existing and create new employer/employee workplace, structure and relationship details for balloting purposes
* Develop and implement new ways of working, creating, collating and maintaining business processes to enable accurate recording and reporting whilst improving business efficiency and minimising cost
* Actively manage master record of information/data capture requests and work for audit purposes
* Lead as escalation point for member and employer ballot related enquiries - resolving enquiries, investigating issues and escalating responding as necessary
* Specific tasks will include:
* Researching employee/employer relationships and amending system information as necessary to ensure Industrial Action balloting compliance
* Accurately manage master record of information/data capture work for audit purposes
* Set up and management of, ballot related operational areas

| **Judgement (independence and level and impact limitations)** |
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| *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)?* |

* Errors can seriously adversely affect the BMA’s ability to manage a legislatively compliant IA related ballot, for example an error with an employee/employer structural relationship could cause the validity of a ballot/IA to be legally challenged and invalidated. This could result in very high legally related expenses and high level damage to BMA reputation
* The role holder will work with high degree of autonomy to manage and distribute information on a day to day basis and be responsible for the approval and release of regular reports and member/non member information both within the BMA and to external agencies. Reports will include general membership and bespoke National, regional and BoP information
* The accuracy and timeliness of information and reports is essential to maintain the legislative compliance of balloting and Industrial Action. The role holder will often be required to work to very tight deadlines.

| **Use of resources (supervision of resources and influence)** |
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| *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 will work with legally sensitive and commercially valuable confidential employer, member and non-member information to produce required reports and be responsible for distributing resultant reports within legislative guidelines
* The role holder will be responsible for giving advice to report users regarding best practice and compliant usage of information

| **Communication (level, internal and external demands and significance)** |
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| *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?* |

* Regular contact with many BMA departments, including Member Relations to senior manager level to advise on/discuss balloting related data information and advise on/discuss application/compliant use of reports and information
* Regular contact with membership to gather/discuss/confirm information and advise/arbitrate on member enquiries
* Regular contact with external agencies/organisations to gather/discuss data and develop best practice
* Approx 20% time spent communicating with members, 30% with other BMA departments and 15% with external agencies.

| **Physical demands & coordination (physical effort and mental strain)** |
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| *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.
* Extensive use of VDU’s will be required, together with frequent periods of high concentration whilst analysing/manipulating data and/or data processing/entry.

| **Working conditions and emotional demands)** |
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| *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?* |

* Although travel to National and Regional centres and offsite venues maybe required, the job is mainly conducted in a normal office environment where the post holder is not exposed to hazardous conditions and contains minimal personal risk.
* The post holder will have frequent contact with members and external agencies, including telephone contact. Due to the nature of subjects discussed, they may be exposed to regular anti-social behaviour and/or verbal abuse.

| **Values and behaviours** |
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| 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** | |
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| Manager: | Date: |
| Role holder: | Date: |