



## JOB DESCRIPTION

### JOB DETAILS

**Job Title:** Senior Policy Analyst, Policy Branch

**Job ID:** AO2701

**Classification:** Administrative Officer R27

**Classification Date:**  
(MM/DD/YYYY)

**Branch:** Policy

**Unit:** BRD-Policy

**Reports to:** Assistant Director, Policy

**Security Screening:** Yes

**Union/Excluded:** BCGEU

### BRANCH DESCRIPTION

The Policy Branch provides pension policy advice to a diverse group of clients, including the pension boards of trustees and corporation staff. The branch prepares amendments to pension plan rules; corresponds with Canada Revenue Agency (CRA) and BC Financial Services Authority (BCFSA) on registration and compliance matters; negotiates, reviews and drafts portability agreements; prepares appeal reports; reviews external communications material; and provides policy development advice and development services on a variety of benefit administration issues.

### JOB SUMMARY

Reporting to the Assistant Director, the Senior Policy Analyst is responsible for providing policy and legislative advice to the pension plan boards, the corporate board, the corporation's executive and corporation staff. The position drafts and reviews legislation; develops policies; identifies and analyzes emerging issues; designs project and research methodologies; and analyzes and facilitates the resolution of complex plan member files.

### JOB RESPONSIBILITIES

1. Provide policy support to the pension boards as required:

- Review and monitor the pension boards' proceedings
- Attend meetings of the pension boards' committees to provide policy analysis
- Review new employer applications
- Design project and research methodologies, conduct assigned policy and research projects, collect/analyze information from a variety of jurisdictions, and develop/explore related policy/legislative options
- Obtain approval and direction regarding rule changes from pension boards
- Lead and participate on cross-organizational teams, develop formal project/work plans and implement the pension boards' initiatives

2. Coordinate and facilitate the pension plans' legislative agenda as required:

- Initiate, coordinate and follow through to ensure completion of the rules amendment process on behalf of the pension boards (i.e. statutes, regulations, OICs, board resolutions, plan texts etc.)
- Coordinate and provide advice for boards, staff, members, employers, and others with respect to legislative and rule changes and defend best course of action
- Provide detailed drafting instructions to legislative counsel
- Develop, review and comment on draft legislation, regulations, Orders in Council, Ministerial Orders, etc.
- Research, prepare and present confidential reports, legislative material and briefing notes

3. Provide policy analysis, options, and recommendations to the corporate executive and staff:

- Provide advice to the Pension Corporation's board/executive with respect to compliance/registration issues
- Pro-actively identify, develop and provide analysis, options, and recommendations with respect to emerging pension issues (i.e. confidentiality/privacy issues, adequacy of communications with members, compliance standards, risk mitigation, consistent application of pension plan rules, developments in other jurisdictions etc.), including determining research methodology, analyzing statistics, providing cost-benefit analysis, interpreting data etc.
- Monitor, identify, and analyze the impact of changes to compliance standards in the Income Tax Act (Canada), the Pension Benefits Standards Act, and other relevant legislation, and advise staff prior to the changes occurring and seek expert legal, tax or actuarial advice when appropriate
- Monitor, identify and analyze rule changes initiated by the pension boards, and advise staff prior to the changes occurring
- Develop and provide policy advice to all areas of the Pension Corporation, in response to requests for general advice and/or case-specific queries, including division of pension matters, application of court orders, separation agreements, powers of attorney, representation agreements, etc. and seek expert legal advice when appropriate
- Provide clarification/confirmation of plan rules for all branches of the Pension Corporation (including review and/or draft material for internal/external communication purposes; develop and maintain plan specific "Plan Analysis" rules documents; review system specifications for business design needs; address policy issues raised by plan administration staff; research historical rules/policies, and respond to correspondence from members/employers)
- Review and recommend approval of LTD plans, using board-approved criteria

- Draft, review, interpret, recommend changes, and provide policy advice with respect to portability arrangements with other pension plans
- Draft, review, interpret, recommend changes and provide policy advice with respect to group benefit contracts
- Identify the Pension Corporation's need for, and work with, legal, tax and actuarial professionals
- Develop and review communications information/material for plan members, plan employers, and Pension Corporation staff
- Develop and review presentation materials and deliver seminars for staff, retired members, plan employers and plan members
- Draft and prepare various documents, including policy bulletins, issue papers, corporate decision documents, correspondence, proposals, reports, seminar/presentation materials etc.

4. Review, analyze and facilitate the resolution of complex and contentious plan member files:

- Prepare appeal reports, including researching complex and contentious plan member files; interpreting and applying legislation, regulations, and pension plan rules; drafting initial appeal report; defending conclusions; and recommending outcome of appeal
- Coordinate the exchange of information and subsequent response on "contentious" member files, namely disputes concerning entitlement to pre-retirement death benefits and the division of pensions under the Family Law Act, and seek and act on legal advice when appropriate
- Research, coordinate response, and instruct counsel with respect to Human Rights complaints, Ombudsman complaints, court cases, collection files etc.

5. Together with the other analysts in the branch, organize and maintain appropriate documentation of branch activities:

- Plan Analysis documents & log
- Decision Documents & log
- Policy Web site & log of Policy Bulletins
- Appeal Reports, decisions and log of appeal reports/decisions
- Log of legal files (i.e. Human Rights complaints, Ombudsman complaints, court cases, collection files etc.)
- Log of legislative initiatives/program
- Policy branch procedures
- Consolidated legislation for public and in-house use

6. Performs other related duties:

- Participate in the branch's and Corporation's strategic planning, business planning, and evaluation processes
- Receive/provide in-house training through active participation in internal training sessions
- Other duties as assigned

## EDUCATION

### Degree/Diploma Obtained

### Program of Study

- Master's degree in a related field such as public administration, business administration, law, economics or social sciences and a minimum of two years of related experience; OR a University degree in a related field as per above and three years of related experience; OR a Diploma/Certificate in a related field as per above and four years of related experience; OR an equivalent combination of education and training and five years of related experience may be considered.

## EXPERIENCE

### Years of Experience

### Type of Experience

- Related experience must include:
  - Researching, analyzing, interpreting and developing policy and legislation;
  - Writing a wide range of documents/content such as briefing notes, issue papers, research papers, memos, and/or executive summaries;
  - Forming and presenting recommendations to decision makers on complex problems; and
  - Planning and coordinating complex projects/assignment.
- Experience in pension administration is preferred.
- Experience with data analysis is preferred.

## KNOWLEDGE, SKILLS & ABILITIES

- Ability to analyze emerging issues, legislation and rule changes and apply research methodologies;
- Excellent policy research and inquiry skills, including the ability to review and critically analyze complex policy issues, and the ability to identify and analyze the ramifications of proposed actions and responses;
- In depth knowledge of policy development practices applicable to public and private sector organizations operating in a complex legislative environment, including the related decision making process;
- Excellent oral and written communication skills, including the ability to compose clear and concise briefing materials, and to present such materials at senior levels;
- Excellent interpersonal skills, including the ability to facilitate constructive discussion;
- Ability to establish and maintain strong working relationships with board members and staff in the corporation;
- Ability to coordinate and lead project teams in the implementation of initiatives;
- Ability to manage multiple projects and priorities in a dynamic environment;
- Strong organizational skills and the ability to manage changing priorities and tight deadlines;
- Proven ability to work effectively, independently and cooperatively with internal and external stakeholders;and

- Ability to manage resources to achieve branch/program goals and objectives, including the ability to effectively negotiate with executive and senior staff on policy recommendations and deliverables.

## CORE COMPETENCIES

### Navigating Change L2

Supporting self and others through change and transition and enabling successful transformation in work products and processes.

- Invites input and feedback on proposed changes.
- Supports others in generating new and innovative approaches.
- Builds support for new approaches and initiatives.
- Shares information on change in a timely manner.
- Identifies innovative approaches to deal with situations for which no known precedent exists.
- Eliminates unnecessary work activities.

### Embracing Learning L2

Contributing to a learning culture by developing self and supporting others to acquire skills and improve performance.

- Gathers feedback from various sources to identify own strengths and weaknesses.
- Pursues challenging experiences beyond current position to add value in own area.
- Helps others identify learning needs to meet current job requirements.
- Provides honest, timely, clear and specific feedback to others.
- Ensures people are provided appropriate training within available budget and resources.
- Encourages people to reach their full potential.

### Client Orientation L3

Making it easy for our external and internal clients - seeing things through their eyes.

- Balances client needs with business realities.
- Represents client needs to more senior management.
- Provides advice on complex problems and initiatives.

### Accountability L2

Holding self and others accountable to deliver on commitments and to achieve desired results.

- Sets challenging but realistic goals for own area of responsibility.
- Helps people improve performance to maximize results.
- Holds people accountable for meeting established expectations.
- Evaluates progress against established goals and objectives.

### Inspiring Trust L3

Inspiring confidence by demonstrating integrity and building credibility.

- Brokers healthy relationships across the organization to further the achievement of business goals.
- Promotes dialogue and shared understanding on business issues.
- Communicates complex issues clearly and credibly with varied audiences.
- Confidently and effectively expresses contrary opinions and own perspectives.
- Accepts alternate perspectives in support of business interests.
- Models trust in others to do their jobs.

### Decision Making L2

Enabling progress by resolving issues and supporting others in taking calculated risks and making decisions.

- Involves the right people in the decision making process.
- Makes decisions by weighing several factors, some of which are partially defined with missing pieces of information.
- Uses sound business sense to make decisions.
- Considers risks when identifying or recommending options.
- Provides context and rationale for decisions.
- Provides information to others to support decision making on complex issues.

### Organizational Focus L2

Aligning work priorities, processes and practices to achieve the strategic direction.

- Optimizes processes or practices to support the achievement of organizational goals.
- Helps team members understand the broader vision and how their work is aligned.
- Identifies broader implications of proposed positions, options and approaches.
- Makes connections between situations and patterns to improve decision making.
- Recommends approaches to address issues with a longer term perspective.