



POSITION DESCRIPTION

Position Details

Position Title: Reviews and Complaints Officer	Business Unit: Investment Product and Trustee Services
Position No: SA5711	Team: Trustee Services
Classification: CED 5	Reports to: Contracts & Complaints Analyst
Employment Type: Full-Time, Fixed Term - 30 June 2011	Direct Reports to this Position: Nil
Date: February 2010	

Primary Role of Position

The primary role of the position is to administer the RBF Board's complaints resolution and internal statutory review processes in a timely manner and in accordance with the Fund's governing rules and regulatory requirements.

Environment and Scope

The Retirement Benefits Fund Board administers and manages Superannuation Schemes in accordance with the *Retirement Benefits Act 1993* and all relevant legislation and Trust Deeds. The Retirement Benefits Fund (RBF) operates in a competitive "choice of fund" environment.

The position is situated in the Trustee Services Team of the Investment Product and Trustee Services (IP&TS) Business Unit. The primary function of the Trustee Services Team is to facilitate the effective governance of the RBF Board through the provision of secretariat support, and the development of well-researched advice on policies, procedures and guidelines to support the Board's governance in a compliant and contemporary manner.

The Reviews and Complaints Officer is responsible for the administration of the RBF Board's complaints and statutory review processes, ensuring that the principles of natural justice are applied for members seeking reviews of delegate decisions. The role also assists the Executive Officer Board in ensuring that best practice administrative and governance support is provided to the RBF Board, Board Committees, and the Executive Management Team.

Reporting to the Contracts & Complaints Analyst, the position is expected to work with minimal supervision. Regular liaison with internal and external stakeholders is required, including Board members, Executive Management Team, RBF staff, RBF members and their legal or other advocates. The role is required to be a member of any RBF committee or group as directed by the Executive Manager Investment, Product and Trustee Services.

While the Reviews & Complaints Officer is expected to organise their own workload, there is an expectation that it would work closely with the Contracts & Complaints Analyst in terms of



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providing regular ongoing feedback about pertinent issues within its area of responsibility and expertise and seeking guidance on recommended courses of action for any specific issues that are identified. The role is required to achieve objectives, goals and KPIs as approved by the Manager Trustee Services.

Organisational Values and Culture

At RBF we want our performance to be amongst the best. We have a set of core values that we hold to be important above all others and have identified underpinning action descriptors that are crucial to our success. Our values are **responsibility, respect, integrity, quality and achieving together**. In performing this role, you are expected to bring these values 'alive' through your daily behaviours.

You are required to comply with all relevant legislation, laws, regulations, standards, codes and RBF policies and procedures.

While at work you must take reasonable care of your own health and safety and the health and safety of other people, including people working under your supervision or direction who may be affected by your acts or omissions at the workplace, in accordance with current Tasmanian Workplace Health and Safety Legislation.

Reporting/Working Relationships

1. The Reviews and Complaints Officer is directly responsible to the Contracts and Complaints Analyst, and is expected to operate with a degree of autonomy and independence in undertaking its responsibilities.

2. Regular liaison and interaction with the following is required:

- RBF Board members
- RBF Executive, Management and Staff
- RBF Members
- External stakeholders such as industry bodies
- External service providers such as legal advisers and Union bodies

Key Accountabilities

The following description of accountabilities is not exhaustive and may include others as directed from time to time.

1. Administer the Board's internal statutory review process in a timely manner by:
 - effectively communicating with members who are often distressed and frustrated;
 - investigating and identifying relevant facts and legislative references for each matter;
 - wherever possible, identifying and documenting any business improvement opportunities;
 - preparing recommended resolutions for consideration of the CEO; and
 - where necessary, co-ordinating hearings before the Board.
2. Administer the Board's complaints resolution process, including the identification of any



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- associated business improvement opportunities, to ensure complaints are handled and resolved in a timely manner, and complaint root causes are identified and treated.
3. Provide assistance to the Executive Officer Board, as required.
 4. Contribute to projects, initiatives, committees and operational plans as required.

Selection Criteria

All selection criteria listed below are specific to this role and must be addressed by application for this position.

Qualifications, Skills and Experience

1. Qualifications in law or superannuation.	Desirable
2. Experience in a complaints management role, including experience in the identification and treatment of complaint root causes.	Desirable
3. Experience working in the financial services industry and knowledge of the associated Financial Services legislative and regulatory environment together with the capability to interpret and implement legislative requirements in a regulatory environment.	Essential
4. Excellent oral and written communication, interpersonal, people management, negotiation and liaison skills; together with the ability to represent RBF in dealings with external service providers and other stakeholders, together with the ability to communicate complex matters in simple and practical terms.	Essential
5. Well developed analytical and problem solving skills with the ability to proactively identify practical business solutions.	Essential
6. Strong prioritisation and organisational skills and ability to pay attention to detail.	Essential
7. Ability to maintain confidentiality.	Essential

Conditions of Appointment

- Appointment is subject to:
- A satisfactory pre-employment police record check and National Police Clearance (less than six months old); such check to be completed prior to taking up the appointment, promotion or transfer.
 - Identity validation
 - Satisfactory reference checks (minimum of two required from past employment) and confirmation of the curriculum vitae/resume
 - Confirmation of qualifications and professional memberships
 - Confirmation of Australian or New Zealand citizenship, Permanent Resident status or valid work visa



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Additional Requirements

- This is primarily a sedentary position which involves desk-based computer work, with routine bending, lifting and occasional walking between office sites.
- Intrastate travel by motor vehicle may be required.

Verification and Approval

Human Resources

Signed by _____

Date ____/____/____

Business Unit Executive Manager

Signed by _____

Date ____/____/____

Review Date: ____/____/____

Note: All position descriptions may be subject to review periodically; at the time of performance appraisal or when necessary to meet business needs. Such review may be initiated by the employee, or the employer subject to RBFB classification review guidelines.