

FOR HR REVIEW:
FINAL DRAFT OF POSITION DESCRIPTION FOR:
FPM GS-07 CUSTOMER SERVICE REPRESENTATIVE—
(As of 12/02/10 December 20, 2010)

POSITION DESCRIPTION

Customer Service Representative, GS-303-07
Office of Field Policy and Management

I. INTRODUCTION

The Regional and Field Offices of the Department of Housing and Urban Development (HUD) are the face of HUD to the state and local governments and citizens of the geographical areas that they serve across America. They assist the full range of HUD's institutional and individual customers and provide support for all HUD program areas including Housing, Community Planning and Development, Public and Indian Housing, and Fair Housing. These offices serve a pivotal role in ensuring the integration of all HUDs programs in their assigned geographical areas. As such, they are key to providing citizens integrated program support and assuring support for sustainable, vibrant and economically viable communities across America. They also provide a vital service to the various HUD program offices linking program capabilities to community needs and resolving HUD cross-program issues in the geographic area. The Regional Office and Field Offices oversee HUD's overall community outreach and customer service efforts, operations, and administrative functions for their respective jurisdictions.

The GS-07 Customer Service Representative is located in HUD's Office of Field Policy Management. Under the supervision of the Regional Administrator (RA), Deputy Regional Administrator (DRA), or Field Office Director (FOD), and with periodic assistance from the Senior Management Analyst(s), and Management Analyst(s), the Customer Service Representative serves as the face and voice of the agency in communities across America and is the first point of contact for HUD's customers and the Department. The incumbent works in a team setting which supports the oversight and delivery of housing and community development programs and special initiatives for the purpose of developing sustainable communities that promote decent housing, a suitable living environment and expanded economic opportunities

The incumbent assists the Office in furthering HUD's mission by functioning as a generalist who provides customer service, and is able to research and compile general information on a full range of HUD programs and services for internal and external customers. In addition, with supervisory or other guidance from FPM management analysts, the Customer Service Representative provides assistance in identifying, monitoring and evaluating community outreach initiatives, customer service needs, gaps in program service for assigned jurisdictions and other activities and events to meet Departmental goals and objectives for achievement of Management Action Plan goals.

II. MAJOR DUTIES AND RESPONSIBILITIES

The Customer Service Representative:

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1. Under the supervision of the Regional Administrator (RA), Deputy Regional Administrator (DRA), or Field Office Director (FOD), and with periodic assistance from the Senior Management Analyst(s), and Management Analyst(s), is responsible for assisting and representing HUD in a variety of internal and external customer service duties and activities, including the professional greeting and referral of visitors and callers to the office and administrative support tasks and procedures. Such work includes a spectrum of functions performed with the utmost professionalism necessary to ensure the smooth operation of an office,. Responds in a professional manner to routine requests for information, refers callers or visitors to the appropriate program officials, and completes follow up actions on requests as necessary.
2. Provides coordination support for both routine and more complex customer service requests, inquiries, and correspondence for the office. Responds to web e-mail requests and distributes media releases, in accordance with instructions. He/she utilizes HUD's critical correspondence systems (CTS, FMS2) or other relevant tracking systems to help ensure correspondence is processed timely and accurately.
3. Assists front office leadership and staff in resolving more complex customer requests, inquiries, and complaints in a timely and efficient manner.
4. Prepares drafts, and processes and/or finalizes Departmental correspondence in accordance with the latest version of the Departmental Correspondence Handbook 2221.1, as revised.
5. Responsible for component parts in assisting supervisor and/or staff in special or major projects. Performs advanced level of support for special events and projects. Compiles data and information, and assembles other needed facts for inclusion in office reports and for other supervisory communications related to the Continuity of Operations (COOP) and local disaster response and recovery efforts
6. Develops, fosters, and maintains, collaborative relationships with HUD partners, customers, and the public through various communication methods used for on- and off-site events, special visits, briefings, and meetings.
7. Proactive and responsible for ensuring assigned administrative functions are completed timely and effectively in support of office operations and staff. Work includes determining specific needs for obtaining, in advance, the needed supplies and materials for events (including displays, charts or signs), as requested and appropriate, for the office or special events. As requested or assigned, other work includes, managing calendars and schedules, providing more advanced support for special events and outreach forums, tracking and completing travel fund-related reports, distributing mail, and maintaining filing systems and records.
8. Provides support for, and conducts more complex research and analysis for use in office profiles, reports, briefing papers, and other communications on trends and data relating to housing and community outreach initiatives, programs, regulations, standards and procedures. Prepares or provides support for development of oral and written reports and presentation materials, graphs,

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- charts, and displays that present clear, concise, and effective information, and analytical results of evaluations and research performed.
9. Uses knowledge of HUD Programs, researches more complex requests and questions, gathers and distributes information in professional manner in response to requests received through phone calls and walk-in visitors needing housing assistance through HUD programs.
 10. Assists management in ensuring timely and effective development, coordination, distribution and implementation of customer service tools, such as cross-program customer service plans, surveys and assessments.
 11. Establishes, maintains, and supports the regular update of customer service-related electronic data, as well as other internal/external information, including data, fact sheets, and reference or resource materials for efficient and effective delivery of customer service duties and office reports and other office communication needs.
 12. Directly completes timely and accurate research and basic analysis of data to support inclusion of same in community profile summaries and other related reports. Also ensures data and information for customer service communications are accurate and maintained on a timely basis.
 13. Performs other job-related duties as assigned

III. FACTOR LEVEL DESCRIPTIONS

Factor 1– Knowledge Required By the Position Level 1 – 4, 550 Points

Employees assigned to this position possess:

General knowledge of HUD programs, community outreach activities, and Departmental goals and plans for quality customer service.

An understanding of business industry practices, trends, policies, and concepts, in order to assist HUD staff in providing advisory services to HUD customers and other program officials.

Ability to communicate well with various levels of management within HUD, as well as with representatives of organizations and individuals outside HUD. Ability to communicate effectively in writing.

Skill, tact, discretion, and diplomacy to deal with a variety of diverse individuals and situations, including situations where individuals may be struggling to resolve certain challenges or difficult situations.

Proficiency in Microsoft Word, Excel, Outlook, and the ability to operate and utilize a personal computer, as well as other application software and to use websites, search engines and similar technology tools to locate needed information.

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Excellent verbal and communications skills as well as having superior telephone etiquette; and good interpersonal skills with customers.

Factor 2—Supervisory Controls Level 2 – 3, 275 Points

The employee reports to and works directly for the Regional Administrator/Deputy Regional Administrator or Field Office Director, or their delegated designee, who defines objectives, priorities, and deadlines for projects or assignments, and assists the employee with unusual situations, problems, or special study issues that do not have clear precedents. However, through a familiarity of the programs supported, the employee carries out the successive steps and handles most problems and deviations in the work assignment in accordance with instructions, policies, previous training, or accepted practices. The employee exercises judgment and personal initiative in planning and carrying out recurring assignments with limited instructions, but refers problems, and unusual or unfamiliar situations not covered by instructions to the supervisor for decision, follow-up action, or assistance. The supervisor ensures that the completed work is technically accurate, adheres to established procedures, and ensures that work products are produced within established timeframes.

Factor 3—Guidelines Level 3 – 3, 275 Points

Guidelines typically include laws and basic HUD administrative policy and procedures, office protocols, and interpretations of guidance from the supervisor and higher-level staff members. Available policy and procedural guidelines have gaps in specificity or are not completely applicable to the work requirements, circumstances, or problems. The employee must use judgment in interpreting and adapting guidelines to apply to specific situations; and is also expected to know and use recognized techniques, procedures and methods of analyzing community problems and initiatives, and recommends changes.

Factor 4—Complexity Level 4 – 3, 150 Points

The work includes various duties, projects, or assignments requiring different and unrelated processes and methods to accomplish such as gathering information and data, analyzing procedures, processes or methods. Assignments or projects involve various actions or steps that are not completely standardized or prescribed in instructions, guidelines, or precedent cases; adaptation or modification of established procedures and methods; various types and sources of information; nonrecurring problems, trends, or issues; and management or program operations with varying or changing conditions. The decision regarding what needs to be done depends upon the analysis of the subject, phase, or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives. The work involves conditions and elements that must be identified and analyzed to discern interrelationships.

Factor 5— Scope and Effect Level 5 – 3, 150 Points

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The purpose of the work is to provide administrative, clerical and support to the programs to ensure that the mission of the Department is fulfilled, and that the goals and objectives of the RA/DRA and FOD are met within policy and program guidelines. The work involves the execution of specific rules, regulations, or procedures and comprises a complete segment of an assignment or project of broader scope. The work affects the design of organization structures and workload; the evaluation and improvement of operating program efficiency and effectiveness.

Factor 6 - Personal Contacts Level 6 – 2, 25 Points

Within the agency, personal contacts are with employees in the same agency but outside the immediate organization. External contacts are with a variety of individuals engaged in different functions, missions, and kinds of work, e.g., members of the public, representatives from various level of other federal, state, and local agencies and community management officials. Contacts are established on a routine basis and are made by telephone, email, or in person.

Factor 7 – Purpose of Contacts Level 7 – 2, 50 Points

The purpose of the contacts is to plan, coordinate, advise or exchange general information between the agency and its customers on HUD services, and to provide assistance to senior staff in recommending efficient ways to achieve organizational objectives and community outreach initiatives.

Factor 8–Physical Demands Level 8 – 1, 5 Points

The work is primarily sedentary in nature and does not require any special physical demands to perform the work. However, some periodic lifting of containers, boxes of materials, or displays (up to 30 lbs) for the mail, or for display or distribution of information at public outreach forums, events and meetings may be required.

Factor 9–Work Environment Level 9 – 1, 5 Points

The work is typically performed in an adequately lighted and climate controlled office. The work also requires out of office meetings with local community groups in non-traditional office environments, that may involve exposure to moderate discomforts, risks, or unpleasantness environment. Occasional travel required.

Total Points – 1485

Grade Conversion = GS-7 (1355-1600)

This position is at the full performance level.

**FINAL POSITION DESCRIPTION FOR
FPM GS-07 MANAGEMENT ANALYST – (December 20, 2010)**

POSITION DESCRIPTION

Management Analyst, GS-343-07

Office of Field Policy and Management

Working/Organizational Title: Analyst

I. INTRODUCTION

The Regional and Field Offices of the Department of Housing and Urban Development (HUD) are the face of HUD to the state and local governments and citizens of the geographical areas that they serve across America. They assist the full range of HUD's institutional and individual customers and provide support for all HUD program areas including Housing, Community Planning and Development, Public and Indian Housing, and Fair Housing. These offices serve a pivotal role in ensuring the integration of all HUDs programs in their assigned geographical areas. As such, they are key to providing citizens integrated program support and assuring support for sustainable, vibrant and economically viable communities across America. They also provide a vital service to the various HUD program offices linking program capabilities to community needs and resolving HUD cross-program issues in the geographic area. The Regional Office and Field Offices oversee HUD's overall community outreach and customer service efforts, operations, and administrative functions for their respective jurisdictions.

The GS-07 Management Analyst position is located in HUD's Office of Field Policy and Management Office, in the Regional and Field Offices. Under the supervision of the Regional Administrator (RA), Deputy Regional Administrator (DRA) or the Field Office Director (FOD), the Management Analyst works in a team setting which supports the oversight and delivery of housing and community development programs and special initiatives for the purpose of developing sustainable communities that promote decent housing, a suitable living environment and expanded economic opportunities

The incumbent performs assignments at the developmental level which requires basic use of techniques in fact finding, analysis, and evaluation, and the use of up-to-date technology and software programs and demonstrated judgment in applying these techniques to perform assignments in support of the RA/DRA or FOD in work assignments and liaison activities.

II. MAJOR DUTIES AND RESPONSIBILITIES

The Analyst:

1. Under the direction and closer supervision of a supervisor and/or under the closer guidance of a more senior professional, and at a developmental level, the GS-07 Management Analyst assists in coordinating and facilitating a specific component of communication among the field staff, grantees, community organizations and

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the general public. The Analyst ensures that their concerns are identified and remedies are identified and discussed with the supervisor before being presented to the client.

2. Under the direction of a Senior Analyst or supervisor, works collaboratively with consumer and industry groups, state and local government agencies, grantees and other stakeholders to support the building of effective inter-agency and inter-organization working relationships.
3. Coordinates components of projects with other HUD clients and FPM and other HUD staff members. The Analyst participates in meetings and ad hoc groups to assist in providing input, to recommended solutions to complex problems, and to identify opportunities to improve areas of mutual concern, and/or innovative methods and ideas to increase program and customer service effectiveness.
4. Provides assistance with components of cross-program coordination as needed to properly integrate and focus HUD program efforts on issues or problems of concern to the RA, DRA and FOD. The Analyst may also assist senior analysts in coordinating components of cross-program activities, events, issues and efforts involving the furtherance of Management Action Plan goals, sustainable housing and communities, faith-based and neighborhood partnerships, and Secretarial initiatives.
5. Is responsible for analyzing the less complex program issues within a portfolio of work usually as a member of a team. The work portfolio can include citizen and congressional inquiries, special projects, and operations. With appropriate guidance from the supervisor, the Analyst identifies and resolves routine program issues, problems and complaints. If more complex or sensitive issues are identified, the Analyst consults with his/her supervisor on the most appropriate ways to resolve the issues identified. The supervisor is kept informed of all unresolved issues.
6. Assists the RA/DRA, FOD or Senior Analyst in identifying and analyzing areas of program performance and customer services in need of improvement, and then recommends solutions to the problems identified. He/she shares this information with internal/external customers as appropriate.
7. Assists in the review and evaluation of the effectiveness of a specifically assigned component of integrated service delivery and identifies areas for improvement in accordance with HUD's Management Action Plan.
8. Based on specific assignments from the supervisor, assists in providing information and technical assistance to foster local public/private partnerships to achieve community goals, to build inclusive and sustainable communities, and

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participates in interagency meetings, workshops, and working groups to coordinate activities.

9. Assists in the distribution of press releases and related public affairs activities, as requested.
10. Participates in the research and analysis of program segments, policies, regulations, standards and procedures. The Analyst then prepares informed oral and written reports and presentations, graphs and charts of findings. The research and analysis conducted may lead to new or improved business and management practices for application to programs and operations.
11. Provides support in research and analysis of basic data, issues and matters assigned by the supervisor. Provides support in the development of component parts for procedures and systems for establishing, operating and assessing the effectiveness of administrative control systems and customer service.
12. Is responsible for entering and tracking Executive Secretariat correspondence, and other controlled correspondence, such as Freedom of Information Act (FOIA) requests and Congressional requests. Identifies established deadlines, ensures officials are notified of deadlines, and conducts follow-up to determine compliance with deadlines under existing HUD policies, and collects fees from public requestors.
13. Provides support to management and senior staff in tracking resources, such as funding, equipment, and facilities used to support various program operations and activities
14. Participates with staff members to recommend initiatives or actions to management that support the development and implementation of program goals and objectives as they support the achievement of the Management Action Plan and activities that align with HUD's strategic plan and strategic goals and objectives for community programs
15. Is expected to use personal computer, database systems, spreadsheets, text processing software, and other up-to-date HUD software products, in maintaining data and documentation, and preparing work products for use by management.
16. Perform other job related duties as assigned.

III. FACTOR LEVEL DEFINITIONS

Factor 1, Knowledge Required by the Position Level 1-6, 950 Points

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Employees assigned to this position are expected to have:

Basic knowledge of a variety of HUD programs and community outreach initiatives, sufficient to plan and conduct an analysis of situations that have been identified as problematic requiring a reasonable solution within appropriate timeframes.

Knowledge of Federal and HUD regulations and directives as well as FPM policies, standards and procedures, programs, and missions to understand their impact on HUD programs as well as operating guidelines governing administrative programs to help initiate program changes.

Knowledge of analytical techniques to identify, considers, and resolves issues or problems.

Basic knowledge of business and industry practices, policies and concepts to assist in providing quality advisory services to HUD current and potential customers and clients.

Knowledge of and skill to apply analytical and evaluative techniques to identify, consider, and resolve procedural or factual issues/problems related to Housing, Community Planning and Development, Public and Indian Housing, Fair Housing and other Department programs and initiatives.

Demonstrated interpersonal skills and ability to work closely with staff, grantees, and various other partners and stakeholders to engage in different functions or missions. The ability to research and analyze basic techniques and methods, and prepare written analytical and administrative documents.

The ability to communicate effectively, both orally and in writing. The Analyst is also expected to possess presentation skills sufficient to brief managers, and to communicate tentative recommendations regarding program effectiveness and efficiency.

Knowledge and use of personal computer software operation and applicability in preparing and analyzing reports, data, charts, tracking information, performing monitoring functions, and disseminating outreach information and other HUD program functions as well as maintain a technical proficiency of computer techniques.

Factor 2, Supervisory Controls Level 2-2, 125 Points

The supervisor identifies general project outlines and the work results desired, determines the methods and procedures to be employed, and provides specific instructions for new, difficult, and unusual assignments. The incumbent performs recurring assignments independently and seeks guidance from the supervisor for unusual assignments. Completed work is reviewed for technical accuracy and conformance with overall policy.

Factor 3, Guidelines Level 3-2, 125 Points

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Guidelines consist of basic HUD administrative standard, policies, statements, regulations, instructions, as well as Departmental memoranda. The number and similarity of guidelines and work situations require the employee to use judgment in locating and selecting the most appropriate guidelines, references, and procedures for application and in making minor deviations to adapt the guidelines to specific cases. The employee may also determine which of several established alternatives to use. Situations to which the existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor. .

Factor 4, Complexity Level 4-3, 150 Points

The work involves areas with diverse and unique functions. The work of the position is concerned with projects, community resource issues that require analysis of related issues regarding the effectiveness, efficient and productivity of substantive management and community operations functions. The employee assists in evaluating the effectiveness, overall adequacy and economic soundness of community program issues. The employee makes decisions regarding what needs to be done based on an analysis of the subject under review.

Factor 5, Scope and Effect Level 5-2, 75 Points

The work involves studies of administrative and managerial processes and procedures to assess productivity, effectiveness, and efficiency of program operations and provide support to higher-level analyst in the completion of management-requested studies and reviews. The work performed by the employee involves segments of major projects or studies being performed and may affect the administrative methods of the organization, managerial processes, or the operating unit within the organization.

Factors 6 and 7, Personal Contacts/Purpose of Contacts Level 2b, 75 Points

Contacts are with employees, supervisors, and managers in the agency but outside the immediate organization, including representatives from offices located elsewhere. Contacts are to coordinate plans, gather information, and give advice on resolving problems on shared work efforts.

Factor 8–Physical Demands Level 8 – 1, 5 Points

The work is primarily sedentary in nature. No special physical demands are required. However some lifting of containers or boxes of materials or displays (up to 30 lbs) for distribution or display at public outreach events and meetings may be required.

Factor 9– Work Environment Level 9 – 1, 5 Points

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The work is typically performed in an adequately lighted and climate controlled office. The work also requires out of office meetings with local community groups in non-traditional office environments, that may involve exposure to moderate discomforts, risks, or unpleasantness environment. Occasional travel required.

Total Points – 1510

Grade Conversion – GS-07 (1355 - 1600)

FPM