



## PERSONAL SERVICE REPRESENTATIVE

### Position Description

The individual in this position helps residents get a job, keep a job or get a better job. She/he

- *guides* customers in identifying work and career goals;
- *plans, arranges and manages* Workforce Solutions service and other community services to help customers reach their goals; including
  - knowing when to test and how to use tests as an assessment tool
  - financial planning
    - using the financial aid application with a detailed plan for income support while attending school
    - identifying a job that provides experience leading to a better job to meet the customer's financial goals
    - identifying jobs using the customers skills that will meet the customer's financial requirements
- *maintains close contact* with customers to help them through each step toward their goals
- *reports* progress and outcomes in appropriate MIS

### Reporting Requirements

Reports to \_\_\_\_\_ (line supervisor)

### Internal Relationships

*Resident Service Division:* All career office staff but has a particular need to work well with Employment Counselors and Financial Aid Specialists.

*Employer Service Division:* Staffing Specialists, Business Consultants, Labor Market Analysts

### Qualifications

- Bachelor degree and 1 year experience in career counseling or other areas of human resources.

OR

- 4 years of experience working at Workforce Solutions in a professional position and a recommendation from current or most recent supervisor
- Knowledge of career counseling techniques
- Knowledge of the workplace and jobs, including requirements for entry into work as well as knowledge of Workforce Solutions' targeted industries and demand occupations, and Workforce Solutions' services and delivery process
- Familiar with services available in the community that can support her customers' employment plans and able to help customers get those services
- Able to conduct labor market research on individual employers and industries, as well as specific occupations and their education, experience and credential requirements
- Able to listen to customers, analyze expressed needs and suggest solutions and action plan. Uses tact, diplomacy, and persistence in providing suggestions to customers
- Proficient in Microsoft Windows and Office; familiar with and able to use computers; able to learn new software
- Works well in teams and with resident customers and other staff (flexible, congenial and adaptable)
- Able to communicate orally and in writing at a business level
- Self-motivated and self-directed
- Results-oriented
- Receives a level 2 certification from the National Workforce Institute within a year of the start date of work as a Personal Service Representative

## **Duties and Responsibilities**

### ***Job Placement***

- Matches customers with appropriate Workforce Solutions job postings and contacts potential employers for the customer
- Helps customers to prepare resumes, write letters of introduction, and thank you notes.
- Gives advice on how to interview successfully
- Helps customer complete on line and other employment applications
- Matches customers with volunteer jobs to develop the customers work skills and experience leading to unsubsidized employment

## ***Career Counseling***

- Provides useful regional labor market information to help customers develop career goals Provides information on opportunities, qualifications, and expected pay in various industries and occupations.
- Provides information relating training courses and pre requisites to employment goals
- Provides electronic, print and other resources to help customers make career and job search decisions.
- Connects customers, who may benefit from other career office staff specialists or other community resources, to that specialist or resource
- Helps customers relate employment goals to their current skills, experience, abilities, and interests.
- Helps customers relate employment goals to education.
- Helps customers relate employment goals to other support services.
- Helps customers understand the time and financial commitment required to meet particular career goals - Guides the customer in choosing whether to make those commitments.
- Continues to work with a customer until employment goals are met

## **Performance Expectations**

### **1. During a 12-month period makes between 16 and 20 direct placements of customers assigned to a Service Representative**

*This expectation is measured in WorkInTexas.com and TWIST*

### **2. Provides quality contact referrals to job postings in WorkInTexas.com** - Supervisors measure this expectation by assessing referrals the service representative has made to job openings. A customer's work application in WorkInTexas.com must clearly document that the customer has all qualifications required in the posting to which the service representative referred her. A supervisor will select a sample of at least 5 referrals each month and rate the referrals on the Personal Service Representative Customer Service Observation and Records Review form.

- ✓ Outstanding - Exceeds performance expectation – 90% - 100% of sampled customer referrals show that the customer met all the job requirements.
- ✓ Proficient - Meets performance expectation – 80% to 89% of sampled customer referrals show that the customer met all the job requirements.
- ✓ Unacceptable - Does not meet performance expectation – 79% or fewer of sampled customer referrals show that the customer met all the job requirements

3. **Provides good customer service** - Supervisors measure this expectation by observing at least two customer interviews a month, noting a description of the interaction and explaining why the staff did a good job and/or how she/he can improve. Record observations on the Personal Service Representative Customer Service Observation and Records Review form.
- The following lists some items the supervisor may observe and describe.
- You greeted the customer correctly
  - You listened to understand what the customer wanted and needed from Workforce Solutions
  - You gave good advice and/or the appropriate service to help the customer meet her/his needs (this includes a review of the number of contacts you gave the customer)
  - You spent the time needed to give good service but did not spend excessive time
  - You explained or confirmed the “next step” to the customer and made an appointment or introduced the customer to a staff specialist when applicable
- ✓ Outstanding - Exceeds performance expectation – 90% - 100% of interviews observed meet expectations.
- ✓ Proficient - Meets performance expectation – 80% to 89% of interviews observed meet expectations.
- ✓ Unacceptable - Does not meet performance expectation – 79% or lower of interviews observed meet expectations.
4. **Provides ongoing quality counseling directed to helping the customer into unsubsidized employment.** *The supervisor will use the Quality Service Records review form to rate and document a random sample of at least 5 customers’ records a quarter.*
- The supervisor will rate the entire customer record including records in all of the management information systems and the paper records for each customer reviewed:
- Records show a clear assessment of the services the customer wants and needs to complete a successful work search
  - Records include a thorough employment plan consistent with the assessment and documented appropriately on the job search map or the more formal TWIST employment plan.
  - Work applications and job search maps, employment plans, and services complement each other.
  - Records indicate that the PSR regularly monitors the goals set by the customer

and the PSR and works with the customer to adjust them when necessary.

The supervisor reviews the entire customer record for five customers each month and determines if the records are acceptable or not acceptable.

- ✓ Outstanding - Exceeds performance expectation – 90% - 100% of customers' records reviewed meet expectations.
- ✓ Proficient - Meets performance expectation – 80% to 89% of customers' records reviewed meet expectations.
- ✓ Unacceptable - Does not meet performance expectation – 79% or lower of customers' records reviewed meet expectations.

### **Overall Performance Rating**

Outstanding – Must be rated outstanding on at least 2 performance expectations and may not be unacceptable in the others.

Proficient – Is not rated either Outstanding or Unacceptable

Unacceptable – Is rated unacceptable in any one or more of the four performance expectations.