

COMMONWEALTH OF PENNSYLVANIA  
TREASURY DEPARTMENT

UNION POSITION VACANCY

THIS NOTICE IS TO ANNOUNCE THAT A  
VACANCY EXISTS AS DETAILED BELOW

- (1) Class Title: Field Representative I - ABLE Program
- (2) Class Code: T9995
- (3) Office: Bureau of Savings Programs
- (4) Pay Range: 6
- (5)\*Last Day to apply for posted positions: 5/30/17
- (6) Work Hours: Work hours are 8:30am to 5:00pm with evening and weekend hours as needed.
- (7) Work Location: Finance Building, Harrisburg, PA 17120

Patrick C. Tighe/pbf  
Director of Human Resources

5/22/17  
Date

ANYONE INTERESTED IN THIS POSITION GO TO  
<http://www.patresury.gov/careers/> TO FILL OUT AN APPLICATION OR USE  
ATTACHED APPLICATION. PLEASE SUBMIT APPLICATIONS TO  
[PBLANCH-FRIEDRICH@PATREASURY.GOV](mailto:PBLANCH-FRIEDRICH@PATREASURY.GOV) NO LATER THAN THE CLOSE  
OF BUSINESS ON THE LAST DAY OF ACCEPTANCE.

TREASURY EMPLOYEES SHOULD USE THE ATTACHED BID FORM TO  
APPLY, WHICH CAN BE EMAILED TO [PBLANCH-FRIEDRICH@PATREASURY.GOV](mailto:PBLANCH-FRIEDRICH@PATREASURY.GOV). NO LATER THAN THE CLOSE OF  
BUSINESS ON THE LAST DAY OF ACCEPTANCE.

## Field Representative I

### **DEFINITION:**

An ABLÉ Field Representative provides outreach and information primarily for the PA ABLÉ Program and, secondarily, for the PA 529 College Savings Program (together “the Programs”) and responds to requests for materials and on-site support from organizations and individuals as assigned. The ABLÉ Field Representative is responsible for generating interest about the Programs in a myriad of ways as needed.

### **DESCRIPTION OF DUTIES:**

**Reactive outreach.** Responds to requests to provide presentations, information booths, webinars, presentations and meetings, and/or literature received from organizations and individuals. Prepares, documents, and submits an overview of all outreach, including event details, for approval to the Marketing Manager via CRM

**Proactive outreach.** Generates interest in the Programs by contacting organizations, employers, professional groups, schools, businesses, and other entities seeking to provide information through those organizations. As with reactive outreach, activities include, making presentations, staffing information booths, conducting informational meetings, and/or providing literature. Schools and employers are prime points of contact for PA 529 and disability advocacy and support organizations are prime points of contact of PA 529 ABLÉ.

**Document contacts and activities.** Maintains organized records of all outreach efforts in CRM. Responsible for initiating follow-up calls and written correspondence as appropriate.

**Maintain program knowledge.** Obtains and maintains an understanding of the Programs and 529 and ABLÉ plans in general.

**Call Center Assistance.** Assist the call center when required, which includes but is not limited to the periods of July-August and November-December. Duties include:

Answering calls from current and prospective account owners.

At the request of account owners, changing account information such as address, telephone number and tuition level, as appropriate.

**Other duties.** Performs other duties as assigned by the TAP Bureau Director, Assistant Director or the Marketing Manager.

### **DECISION MAKING:**

Identifies and takes advantage of opportunities to promote the Programs through the workplace outreach channel, professional development conferences and conventions, school districts, state agencies, disability advocacy and support organizations, and community events. Establishes and maintains on-going working relationships with these contact organizations through which prospective participants can best be reached.

### **REQUIREMENTS:**

Valid Driver’s License.

## **REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:**

- Ability and willingness to travel in unfamiliar areas, including the ability to read maps and follow directions.
- Ability and willingness to work evenings and weekends periodically, including occasional overnight travel.
- Physical ability to lift and carry objects up to 40 pounds, to walk up or down two flights of stairs, and to stand for prolonged periods of time.
- Demonstrates discretion, integrity, and professional ethics.
- Excellent interpersonal and communication skills including: outgoing, persuasive, congenial, personality; assertiveness; active listening; being able to help those unfamiliar with the Programs articulate their questions; accurately interpreting non-verbal communication cues, social perceptiveness, good reading comprehension, good writing skills, good oral communication skills.
- Initiative; ability to identify and follow-up with appropriate leads.
- In-depth knowledge of the Programs and related topics and ability to effectively convey that knowledge to others.
- Understands, retains, and appropriately uses all information and resources provided for Program Representatives independently and without the need for repeated supervisory guidance.
- Ability and willingness to work independently with little supervision.
- Ability and willingness to work cooperatively and assist other ABLE and 529 Program Representatives when needed.
- Strong organizational and time management skills.
- Ability to learn, retain, quickly recall, and explain complex and detailed information.
- Ability to stay focused and on-task while carrying out any work function but especially while communicating with any member of the public.
- Ability and willingness to give high quality, professional public presentations to large audiences.
- Ability and willingness to present webinars.
- Ability to establish and maintain working relationship with professional, community, and government organizations.
- Knowledge of appropriate computer applications including Word, Outlook, PowerPoint, Excel, CRM, and all applications necessary to perform call center functions.
- Basic understanding of investing including stocks, bond, and mutual funds.
- Basic understanding of college affordability landscape, including federal financial aid programs, student loan information, and national/statewide statistics
- Basic understanding of public programs that support individuals with disabilities and the interaction of those programs with ABLE accounts

## **MINIMUM EDUCATION AND EXPERIENCE:**

Four-year college degree required; major in marketing, communications, finance, or sales preferred. A combination of education and experience equal to a four year degree may be considered. Familiarity with disability support and advocacy government agencies and non-profit organizations a plus.