

**Small Business Administration
Office of Field Operations
Outreach and Marketing Specialist
GS-1101-11 (FPL: GS-11)**

TERMS OF USE:

This position description is intended for use without modification. Any changes (*e.g.*, pen-and-ink) to the duty statements, factor level descriptions and benchmarks may jeopardize the classification determination. Further information regarding this process may be obtained from the employee's immediate supervisor or Human Resources. **This SPD is intended to abolish all previously classified Economic Development Specialist and Lender Relations Specialist position descriptions in the Office of Field Operations, SBA.**

I. INTRODUCTION:

The Outreach and Marketing Specialist (OMS) at the GS-11 level is the first full performance level of the OMS. The OMS-11 serves as a member of the District Office Team in a defined capacity and is an important contributor to the District's overall success.

The incumbent uses a variety of standard reference materials and applies these to program responsibilities. Precedents typically exist for the work performed. This position performs the regular and recurring OMS work in the District office, referring the most complex to a higher-level OMS. Employees of this level resolve conventional problems and may be assigned portions of more broad assignments by a senior specialist, lead or supervisor.

The incumbent actively engages in:

- Marketing SBA programs and services through outreach, training, and education to various organizations and small businesses;
- Conducting outreach, training, education, development, lender recruitment, and consultation with all lenders in the District;
- Building and maintaining collaborative alliances and partnerships with Resource Partners, economic development organizations and small business owners;
- Assists in reviewing efficient deployment of tax dollars to SBA program grantees, and the effective and compliant use of funds by grantees;
- Assists in monitoring co-sponsorships; and
- Furthering the SBA mission.

The incumbent works in the District with assigned groups, organizations, associations, coalitions, and partners whose constituents, and/or members may benefit from the use of SBA programs and services especially those who align with the SBA strategic initiatives or are new to SBA programs and services.

II. MAJOR DUTIES:

Collaborative partnerships:

Incumbent will assist in building and maintaining a local network of collaborative partnerships: economic development practitioners in Federal, state, regional and local government, chambers of commerce, business and trade associations, financial institutions, educational institutions and civic/community organizations:

The incumbent will conduct required face-to-face partnership visits with economic development officials, lending institutions and representatives of independent organizations for the purpose of identifying opportunities to deliver SBA programs and services.

The incumbent will identify and develop opportunities for events, strategic alliances and co-sponsorships between SBA and community organizations to foster economic development in the local market. Lender visits will include new, active, inactive lenders and other lending entities. The focus of the visits will be on lending institution engagement and product expansion/market penetration. The focus of the visits is mutually to identify the needs of the small business community, and to develop and implement solutions to meet those needs.

The incumbent must complete required reporting in accordance with the agency standard. As an OMS specialist the incumbent will provide technical oversight, consultation and training to OMS GS-7/9 specialists and/or other District Office staff involved in these activities.

Outreach:

The incumbent will represent the SBA at a variety of public functions through outreach/presentations/trainings in order to educate the small business, lender and contracting community about SBA programs and services, and other small business-relevant topics. The incumbent will assist, identify and execute events.

Conducts outreach events & presentations/trainings and ensures their alignment with SBA and District Goals and Objectives.

Outreach Events:

Outreach events include, but are not limited to tradeshow, workshops, round tables, expos, matchmakers, career fairs, business awards events, chamber events, targeted conferences to underserved markets. The incumbent may be called on to participate in or lead projects to accomplish outreach events and will be expected to collaborate with others on the team and other resources to ensure that the projects are successful.

Presentations:

The incumbent will deliver formal presentations to various internal and external audiences, that include but are not limited to programs about capital access, government contracting, entrepreneurial development, disaster preparedness, exporting assistance, and other SBA outreach initiatives.

Trainings:

Trainings to staff or external clients can take place at group or on individual levels. All outreach events and trainings are required to be documented according to agency standards.

Advise and refer a small business or individual that contacts SBA for assistance, to an appropriate SBA and/or economic development resource partner.

The incumbent may review and advise a small business client on readiness for business. A GS-11 in this role should have knowledge of SBA's programs, but not limited to contracting programs, counseling tools, resources, lender programs and services. The OMS GS-11 should have a general understanding of the referral process for engaging SBA partners to provide the small business client appropriate assistance.

The primary focus of this task is to provide assistance through consultative interactions with small businesses, collaborative partners and the general public on an individual basis. Interactions include telephone calls, emails, meetings and office visits regarding SBA programs and services in a professional and courteous manner.

The incumbent will assist in providing consultation and collaboration with other SBA staff members and/or SBA Resource Partners, to include but not limited to, Small Business Development Centers (SBDC), SCORE offices, Women's Business Centers (WBC), and Veteran Business Outreach Center (VBOC) and grant recipients.

The incumbent conducts training in a professional manner and in alignment with the SBA's Strategic Plan. All interactions and information are to be documented as required according to agency standard.

Oversight and Compliance:

The incumbent serves as a field technical representative responsible for compliance oversight of SBA district office Resource Partners. These include, but are not limited to, the Small Business Development Centers, SCORE, Veteran Business Outreach Centers, Women's Business Centers and PRIME grantees, where precedence exists for reference, and accepted principles are applied.

The incumbent assists in the management of assigned Resource Partner relationships and acts as liaison between program offices, the grants office, and grantees. The incumbent assists in conducting program evaluations, as well as monitoring awardee performance, ensuring that grantees comply with terms and conditions of award.

Provides technical information, education and training to SBA lenders. Provides technical training on SOP's, ETRAN and SBA One. The incumbent recognizes the optimal use of SBA finance programs and can recommend possible financing solutions to credit worthy small business concerns.

Local Market Duties:

The local market duties are non-grade-controlling as the work is determined equal to or less than the grade of the position's classification. Additionally, the primary purpose of the position is described in the individual factor narratives. At time of announcement/application of this PD, the supervisor will identify by "X" duties to be performed. Subsequent changes will be documented as required by agency standard. Each individual LMD must be less than 25%.