



Associate (2 Positions)

The [Cities for Financial Empowerment Fund \(CFE Fund\)](#) supports municipal efforts to improve the financial stability of households by leveraging opportunities unique to local government. By translating cutting-edge experience with large-scale programs, research, and policy in cities of all sizes, the CFE Fund assists mayors and other local leaders to identify, develop, fund, implement, and research pilots and programs that help families build assets and make the most of their financial resources. Financial empowerment spans four key disciplines:

- Professional financial counseling and education
- Access to safe and affordable mainstream banking products and services
- Short- and long-term asset building
- Consumer protection in the financial services marketplace

The CFE Fund is seeking two talented and experienced Associates to support the Bank On program: Associate (Banking Integrations) and Associate (Bank On Operations). The ideal candidates will have experience handling a wide range of project management tasks and will be able to work independently. Candidates must be exceedingly well-organized, flexible and enjoy the challenges of supporting a small, entrepreneurial organization.

Due to current public health guidance, these positions will start remotely. There is a strong preference for candidates living in the New York City area after the COVID-19 related restrictions have ended. These positions will require regular national travel when public health guidance allows.

The two specific job descriptions follow, with responsibilities and qualifications applicable to both afterward. Please indicate in your application for which position you are applying, and why. If you would like to be considered for either position, please additionally indicate your preference and the reason for that preference.

The ***Associate (Banking Integrations)*** will focus on providing technical assistance to grantees as they build banking integrations into their programs, which include [Summer Jobs Connect](#) as well as other [Bank On](#) initiatives. Supporting banking integrations requires an understanding of the underlying social service program and then working with grantees to build in opportunities to support clients to open and regularly use safe and affordable bank accounts. Direct experience with large social service programs or systems (e.g. workforce development, foster care services) is highly valued.

Responsibilities unique to this position:

- Support technical assistance delivery to a portfolio of municipal programs, which includes:
 - Developing content expertise on banking integration approaches and underlying social service models;
 - Helping to analyze programs to understand when the programs connect with participants and how infrastructure can be modified to allow for electronic payments; and

- Supporting programs to provide opportunities for unbanked and underbanked participants to open safe bank and credit union accounts to receive wages, disbursements, or other cash benefits.
- Assemble a robust collection of resources for [Summer Jobs Connect](#) partners.
 - Organize partners’ best practices to share with learning community members.
 - Assist with aggregating and analyzing program data.
 - Work with the CFE Fund communications team to collect, develop and disseminate resources.
- Support learning community of financial institutions.
 - Work with financial institutions to ensure account terms and account opening procedures are aligned with programmatic goals and CFE Fund Standards.
 - Maintain records to track the account terms of partnering financial institutions.
 - Support financial institutions to learn from others that have made their account available for local program integrations.

Qualifications unique to this position:

- A minimum of three years of relevant work experience with program operations and support;
- A bachelor’s degree, or at least six years of relevant experience in lieu of a degree; and
- Experience with project management, preferably with large social service programs or systems (e.g. workforce development, foster care services).

To apply, please email a resume and cover letter to info@cfefund.org. Please include “Associate (Banking Integrations)” in the subject line.

The **Associate (Bank On Operations)** will support program management, operations, and grantmaking for several CFE Fund initiatives, primarily focused on [Bank On](#) .

Responsibilities unique to this position:

- Support technical assistance development and delivery to Bank On coalitions, which includes:
 - Supporting new and existing coalitions, including providing support and technical assistance during the planning and implementation stages of coalition development; and
 - Assisting coalitions in designing plans to launch and sustain a robust coalition infrastructure.
- Support the account certification process.
 - Track outreach to financial institutions on certification and maintain key information in the CFE Fund’s central Salesforce database.
 - Participate in calls with financial institutions and execute necessary follow-up.
 - Review account submissions for completeness, and facilitate application submission to the Fund’s account validation partner.
 - Coordinate with CFE Fund communications staff on new product certification and ensure related communications tasks are completed.
 - Liaise with financial institutions on recertification and other issues as they arise.
- Support the Bank On National Data (BOND) Hub.

- Track participation in the BOND Hub including the status of active participants and other eligible financial institutions.
- Support Bank On coalitions in understanding, customizing, and utilizing local data.
- Coordinate with the BOND Hub data partner and the CFE Fund communications team on deliverables and dissemination.

Qualifications unique to this position:

- A minimum of 2 years of relevant program support experience;
- A bachelor’s degree, or at least five years of relevant experience in lieu of a degree; and
- Experience with event coordination, including both planning and day-of logistics, of live and virtual conferences, trainings, or other learning community events.

To apply, please email a resume and cover letter to info@cfefund.org. Please include “Associate (Bank On Operations)” in the subject line.

Common responsibilities across both positions:

- Manage grantees:
 - Serve as point of contact for grantees and communicate in a timely and professional manner.
 - Serve as a resource for grantees about coalition structure and activities, banking standards, and certifications.
 - Identify areas for additional support, gather content, and draft technical assistance resources.
 - Participate in regular calls with grantees to provide feedback, introduce new resources, and troubleshoot issues.
 - Document and archive technical assistance requests and responses.
- Coordinate learning communities:
 - Produce learning community events, trainings, webinars, and other meetings.
 - Develop event agendas including identifying learning objectives, identifying speakers and presenters, and optimizing opportunities for grantees to learn and contribute.
 - Lead coordination of logistics, development of materials, and on-site execution and troubleshooting.
- Join program site visits to grantees across the US, as public health guidance allows:
 - Prepare CFE Fund staff and on-the-ground partners to ensure efficient and productive visits.
 - Coordinate and support multi-partner meetings with a range of staff, city leaders, financial institutions, funders, and other local stakeholders.
 - Provide on-the-ground implementation support and troubleshooting.
 - Provide feedback and analysis of on-the-ground operations, including production of field visit reports and briefings.
- Manage grant administrative work:

- Drive the selection process to identify grantees including drafting solicitations, soliciting responses, developing evaluation criteria, and leading evaluation processes.
- Conduct due diligence of potential grantees and vendors, engage in follow-up with applicants as needed, and make grant recommendations.
- Serve as point of contact for grantees for all administrative and programmatic functions.
- Ensure grantees receive reporting templates and submit reports in a timely manner, review submitted reports, and provide summaries to CFE staff.
- Contribute to funding requests and reports as needed.
- Process payment requests.
- Maintain and track relevant program and partner information in internal databases, including but not limited to Salesforce and a grants management system.
- Provide other program support as necessary.

Common qualifications:

- Demonstrated ability in identifying, cultivating, and maintaining partnerships.
- Strong project management experience, with ability to juggle multiple priorities, keep team on track with deliverables, manage multiple relationships, and meet deadlines.
- Strong interpersonal and communications skills, with the ability to work closely with a wide range of constituents, including financial institutions, senior-level government partners, funders, internal staff, consultants, and community-based organizations.
- Ability to take initiative and move projects forward in a fast-growing, entrepreneurial environment.
- Excellent time management skills, with the ability to multi-task and prioritize work.
- Attention to detail and problem-solving skills.
- Excellent written and verbal communication.
- Strong organizational and planning skills.
- Proficiency in standard office technology and software including Windows, Zoom, MS Office.

These positions offer excellent benefits and competitive salaries commensurate with qualifications. The CFE Fund is an Equal Opportunity Employer.