



Associate, Bank On

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 a talented and experienced Associate to support the Bank On program. The ideal candidate 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.

This is a New York City based role. New York City-based CFE Fund staff have the option of working in person from our NYC headquarters, or they may elect a hybrid office/remote work schedule with a minimum of 2 days in the office. All employees are required to provide proof of receipt of an FDA-approved vaccination against COVID-19, including both a primary series and a booster as recommended by the CDC. This position will require regular national travel as public health guidance allows.

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

Responsibilities include:

- 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 submission to the Fund's account validation partner.
 - Coordinate with CFE Fund communications staff on new product certification.
 - 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.
- Manage grantees:
 - Serve as point of contact for grantees and communicate in a timely and professional manner.
 - 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..
- 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 multi-partner meetings with a range of staff, city leaders, financial institutions, funders, and other local stakeholders.
 - 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.
 - 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.

Qualifications:

- 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
- 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.
- 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.
- Proficiency in standard office technology and software including Windows, Zoom, MS Office.

The CFE Fund offers excellent benefits and competitive salaries commensurate with qualifications. The salary range for the Associate title is \$55,000-70,000 based on qualifications, worksite location, and team parity. The CFE Fund is an Equal Opportunity Employer.

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