



Principal (Bank On Integrations)

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 an experienced Principal to lead a varied portfolio of programs that feature banking access integration under the [Bank On Initiative](#), including [Summer Jobs Connect](#). The Principal will focus on program strategy, design, partner technical assistance delivery, management, operations, and grantmaking for the CFE Fund's banking integration programs and pilots. The ideal candidate will have experience designing programs, leading program implementation, supporting partners, managing staff, handling a wide range of project management tasks and will be able to work independently. This person must be exceedingly well organized, flexible, and enjoy the challenges of working in a small but national entrepreneurial organization. Direct experience with large social service programs or systems (e.g. workforce, foster care, free tax preparation) is highly valued, as it is critical to understand program operations when providing technical assistance to partners that are programmatically layering banking access. Direct experience either within or with local government also is highly valued, as the CFE Fund's primary grantees are local governments and their partners.

This is a New York City-based position, although exceptional candidates who must live elsewhere may be considered. 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. Remote employees must secure their own work environments and travel approximately monthly to New York City to meet with teammates. 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 U.S. Center for Disease Control. This position will require frequent domestic travel.

Primary Responsibilities:

- Lead the delivery of technical assistance to a portfolio of banking access program integration grantees, including in the Summer Jobs Connect initiative and other banking access integration pilots and programs.
 - Conduct partner selection and contracting processes in consultation with organizational leadership and with the support of program and contracting staff;
 - Develop technical assistance tools including training guides, logic models, FAQs, templates, and other resources to support CFE Fund grantees;
 - Deliver technical assistance through trainings, regular phone calls, and annual site visits;
 - Conduct program site visits to grantees, coordinating and leading multi-partner meetings with a range of stakeholders, and providing on-the-ground implementation support and troubleshooting;
 - Conduct analysis of on-the-ground operations, including production of field visit reports and briefings;
 - In conjunction with program and events staff, design and 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; and
 - Document and archive technical assistance requests and responses.

- Support the design of new banking access integration programs and pilot efforts.
 - Identify potential opportunities for banking access program integrations and develop content expertise on [banking integration approaches](#) and underlying [social service program models](#);
 - Serve as an expert advisor for Bank On Coalitions across the country and other CFE grantees working on local banking access integration partnerships; and
 - Support the CFE Fund development team and senior leadership in fundraising for new pilots and programs.

- Manage internal and grants administration.
 - Supervise an Associate who is dedicated to Summer Jobs Connect and any future staff members assigned to banking access program efforts;
 - Lead program teams, assigning and managing the program related tasks for all team members; and
 - Work with various internal CFE Fund teams including development, communications, research, finance, and contracts to ensure all programs and grantees are in compliance with and supported by CFE Fund resources.

- Other program work as necessary.

Minimum Qualifications:

- A minimum of seven years of relevant experience, including staff supervision;
- A Bachelor's Degree, or at least ten years of relevant experience in lieu of a degree;
- Experience with project management, preferably with large social service programs or systems;
- Demonstrated ability in identifying, cultivating, and maintaining various stakeholder partnerships;
- 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, 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; and
- Experience in local government, social services, financial empowerment, asset building, and/or community development strongly preferred.

The CFE Fund offers excellent benefits and competitive salaries commensurate with qualifications. The salary range for the Principal title is \$85,000-110,000 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 "Principal (Bank On Integrations)" in the subject line.