

## Principal

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 new portfolio focused on long-term asset building, including legacy planning. The Principal will focus on program strategy, design, partner technical assistance delivery, management, operations, and grantmaking to build out this new portfolio. The ideal candidate will have experience designing programs, leading program implementation, supporting partners, leading project teams, and 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, entrepreneurial organization. Direct experience with large social service programs or systems (e.g. workforce, foster care, free tax preparation) is highly valued, as is experience with partnership development, stakeholder engagement, and funder relationship management. Direct experience in a range of financial stability issues is also of interest, including asset building, legacy planning, and financial counseling.

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 two 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. Centers for Disease Control. This position will require frequent domestic travel.

### Primary Responsibilities:

Support all aspects of CFE Fund's new legacy planning portfolio, including furthering legacy planning efforts within the [Financial Empowerment Center \(FEC\)](#) model, as well as other CFE Fund priority areas.

- Develop and lead all aspects of the portfolio, including:
  - Working with senior leadership to scope out the components of legacy planning and long-term asset building that align with the CFE Fund's priority areas;
  - Identifying opportunities for infusing principles of legacy planning into other CFE Fund programs; and
  - Providing ongoing technical assistance and development of necessary technical assistance resources to support cities and counties in their efforts to embed legacy planning within their financial empowerment work.
- Work under the Financial Empowerment Center (FEC) initiative model, including:
  - Serving as the primary liaison for a legacy planning implementation effort, including working closely with project funders;
  - Managing key external stakeholders, including field experts, local grantee stakeholders, and external consultants;
  - Designing model updates to include key components of legacy planning work within the FEC model; and
  - Working closely with Database Administrators to design necessary database enhancements.
- Work closely with the FEC team to implement legacy planning strategies across all FEC localities (currently 30 and growing), including:
  - Developing technical assistance tools including training guides, logic models, Frequently Asked Questions, templates, and other resources to support FEC partners;
  - Delivering technical assistance through trainings, regular phone calls, and other learning community efforts;
  - Conducting in-person site visits to grantees, coordinating and leading multi-partner meetings with a range of stakeholders, and providing on-the-ground implementation support and troubleshooting;
  - Designing and producing learning community events, trainings, webinars, and other meetings in conjunction with program and events staff; and
  - Reviewing regular data reports from local partners, identifying areas of success and areas for improvement, and developing a feedback loop to incorporate program data into further model refinements.
- Manage engagement budgets and ensure fiscal management of all resources, including:
  - Reviewing and analyzing financial statements to make recommendations to CFE Fund leadership on budget priorities and grant strategies;
  - Preparing and delivering regular programmatic and financial progress reports to appropriate stakeholders;
  - Supporting funder relationship management through regular communications and timely reporting.
- 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.*