

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; and
- Consumer protection in the financial services marketplace.

The CFE Fund is seeking a talented and experienced Senior Associate to support the [Bank On initiative](#) in engaging and deepening relationships with financial institution partners. Direct experience with consumer financial institutions is highly valued, as is experience with partnership development and stakeholder engagement. The ideal candidate also has project management experience, is exceedingly well-organized, flexible, able to work independently, and enjoys the challenges of supporting a small, entrepreneurial organization.

This position will report to the Senior Principal who oversees Bank On operations. This is a New York City-based role, although exceptional candidates who must live elsewhere may be considered. The CFE Fund is headquartered in New York City, and NYC-based staff can work in person from our NYC office or may elect a hybrid office/remote work schedule with at least 2 days/week in the office. Remote employees must secure their own work environments and travel approximately monthly at the CFE Fund's expense to NYC to meet with colleagues. This position also requires travel to other locations to participate in Bank On convenings, engagement opportunities, and provide technical assistance to partners.

Primary Responsibilities:

Manage and Promote the [Bank On Account Certification Process](#)

- Build expert-level understanding of the [Bank On National Account Standards \(NAS\)](#).
- Manage the account certification submission process, including reviewing account submissions for completeness; maintaining key information in the CFE Fund's central Salesforce database; coordinating with CFE Fund communications staff on new certifications; and facilitating submission of accounts to the CFE Fund's account validation partner.
- Cultivate and sustain relationships with financial institutions throughout the certification process by answering questions, sharing information, and supporting their internal stakeholder management.
- Regularly present on the NAS, the benefits of account certification, and the certification process to external audiences including Bank On coalitions and financial institutions.
- Develop and implement systems for post-certification follow-up with financial institutions to further engage and connect them into the Bank On movement.
- Build and implement targeted recruitment strategies to encourage new financial institutions (particularly small and medium-sized banks and credit unions) to develop and submit products for certification.

- Oversee continued refinements to the certification process and financial institution-facing resources.
- Liaise with financial institutions on account recertification and other issues as they arise.
- Manage the biennial NAS revision process, including collecting and consolidating suggested modifications and coordinating the review process with CFE Fund leadership.

Assist in Managing the [Bank On National Data \(BOND\) Hub](#)

- With the CFE Fund’s research team, illuminate key findings from the national BOND Hub data report, and identify new audiences, opportunities, and uses for this rich dataset.
- Develop and implement a targeted BOND Hub recruitment strategy to increase the number of financial institutions reporting to the BOND Hub.
- Support Bank On coalitions in understanding, customizing, and utilizing local BOND Hub data, and facilitate coalitions’ capacity to talk to financial institution partners about the benefits of reporting.
- Coordinate with the BOND Hub data partner and the CFE Fund communications team on deliverables and dissemination strategies.

Support Bank On Coalitions’ Engagement with Financial Institutions

- Train coalitions on the NAS, the benefits of certifying accounts, and strategies to increase financial institutions’ reporting their data to the BOND Hub.
- Develop and deliver training and resources to Bank On coalitions to increase effective and innovative partnerships with financial institutions.
- Work with our Bank On coalitions and Summer Jobs Connect partners to assist them in more systematically and proactively connecting with and deepening relationships with the financial institutions serving their communities.

Minimum Qualifications:

- At least five years of relevant experience; strong preference is for candidates with experience in consumer financial institutions. Experience with nonprofits and/or local governments also valued.
- A bachelor’s degree, or at least six years of relevant experience in lieu of a degree.
- Demonstrated ability to work independently, take initiative, and move projects forward.
- Strong problem-solving skills and attention to detail.
- Strong interpersonal communication skills; ability to work closely with a wide range of stakeholders, including financial institutions, government partners, community-based organizations, and internal staff.
- Strong project management experience and time management skills, with ability to juggle multiple priorities, keep team on track with deliverables, manage multiple relationships, and meet deadlines.
- Excellent written and verbal communication skills, including strong public speaking skills for both virtual and in-person audiences.
- Proficient in standard office technology including Windows, Zoom, MS Office and databases.

The CFE Fund offers excellent benefits and competitive salaries commensurate with qualifications. The salary range for this Senior Associate role is \$70,800- \$92,000 based on qualifications, worksite location, and team parity. The CFE Fund is an Equal Opportunity Employer. We seek applicants with diverse backgrounds and lived experiences that can help enhance our approach to supporting municipal financial empowerment efforts.

To apply, please email a resume and cover letter to info@cfefund.org with the subject line:

Senior Associate (Bank On). Applications will be reviewed on a rolling basis with final deadline of May 3rd. Interested applicants are encouraged to apply right away. Applications considered after May 3rd will not be considered.