

PARTNERSHIP for FINANCIAL E Q U I T Y

Director of Research and Membership Engagement

Full Time
Boston, MA

Salary Range: \$100,000 To \$110,000 Annually

Reporting to the Executive Director, this position is responsible for leading the work with Partnership for Financial Equity (PFE) Committee members to identify and advance research ideas that focus on financial equity and inclusion. In addition, this position will work to identify member needs, recruit new financial institutions and community organizations to become PFE members, and support PFE member sustainability.

PFE has a successful track record of convening diverse stakeholders, engaging in vital research and communicating both the results of that research and their connection to the interests of the public to advance the goal of greater financial equity in low- and moderate-income communities. The Director of Research and Membership Engagement will work with the Executive Director, board members and member organizations to oversee our existing research relationships, explore new research projects, and well as expand our membership base with both financial institutions and community organizations. The Director of Research and Membership Engagement will be a mission-driven leader who seeks to scale the impact of PFE and its members. This position requires someone who will be nimble, flexible, and adaptable, and a creative thinker who is comfortable pursuing multiple paths. Additional qualities and skills include:

- Demonstrated ability to create innovative solutions to complex issues and challenges;
- Capacity to network to sustain existing members and recruit new ones;
- Aptitude for facilitating and managing groups, and ability and commitment to collaborating with peers and partners;
- Energized by group problem solving and leveraging expertise in a group;
- Strong motivational and organizational skills; equally comfortable leading projects;
- Committed to building PFE's brand and subject matter expertise and leadership

CORE RESPONSIBILITIES

Building off PFE's thirty-five year history of convening diverse stakeholders and researching topics of importance to low- and moderate income communities, the Director of Research and Membership Engagement will be responsible for engaging with our members and future members to ensure our agenda is meeting member needs and advancing our mission of greater financial equity for low- and moderate income households and communities of color. Working closely with the executive director, the Director of Research and Membership Engagement will:

- Staff at least three PFE committees working with the co-chairs to set agendas, attract speakers, and increase participation and engagement among PFE members and non-members.
- Solicit regular member input regarding issues that PFE should be addressing.
- Work with members and partners to identify opportunities that advance PFE's commitment to racial and financial equity.
- Engage with our research partners at partnering organizations to design, edit and produce final mortgage lending and small business lending reports annually.
- Organize, with the executive director, an annual Financial Equity Summit that serves as place for members, partners, thought leaders and others to network, share best practices, elevate innovative programs.
- Catalogue new research ideas and maintain a research pipeline for regular discussion with committees and board. Meet with potential research partners to discuss potential collaboration.
- Produce at least one research project annually on a topic of interest to our members working with committee co-chairs and/or external partners
- Track federal and state policy developments of relevance to the Community Reinvestment Act, fair lending, and other similar laws
- Work with executive director to meet regularly with existing members and potential new members to listen and engage in improving our value to members and learn about best practices/programs that are equity-focused to share with our members.
- Contribute content for PFE website and e-newsletter
- Analyze market needs and opportunities by conducting and/or overseeing qualitative and quantitative market research and data collection from several sources to determine market size, growth potential, financial viability, and competition.
- Collaborate with the executive director on a fundraising plan and work to meet goals in the plan regarding membership, Summit sponsorship and other potential opportunities.
- Attend relevant conferences, as appropriate, to stay current and develop ideas for PFE activities and projects.
- Other duties as assigned by the executive director.

QUALIFICATIONS

- BA/BS and minimum of 8-10 years of relevant work experience.
- Ability to assess potential research opportunities related to our mission.
- Ability and interest in relating to and empathizing with populations from different cultures, backgrounds, and lived experiences, and to approach the work through a racial equity lens.
- Interest and experience in cultivating collaborative processes, with emphasis on member engagement to inform and accelerate innovation and positive change.
- Facilitation and listening skills, and the ability to work with a diverse set of stakeholders to extract, synthesize, and communicate key insights.
- Superior project management skills and ability to work under multiple competing deadlines.
- Creativity, intellectual curiosity, and an ability to be flexible/adapt effectively to change.

- Strong interpersonal and networking skills to interact with PFE members, staff, and partners.
- Comfort with technology tools and the ability to quickly learn new tools and systems.
- Knowledge of the banking and community development sector and/or working with low-income populations and understanding common challenges and needs.

LOCATION

PFE operates with a largely remote model with important distinctions. Employees may work from anywhere in the region as long as they are able to attend in-person meetings across Massachusetts on a regular basis. Occasional out-of-state travel is required for in-person meetings and conferences. The ideal candidate should be prepared to work from their home, and be comfortable balancing virtual communication with the ability to travel.

COMPENSATION

Salary: \$100,000-\$110,000. Commensurate with education and experience.

BENEFITS:

20 vacation days, 12 sick days, 12 paid holidays, paid personal days, medical and dental insurance, retirement match, parental leave.

TO APPLY:

Please submit a resume and cover letter by February 28, 2025 to tcallahan@financialequity.net detailing your interest in this opportunity and your relevant skills and expertise.

ABOUT THE PARTNERSHIP FOR FINANCIAL EQUITY

We are a partnership of financial industry professionals, community leaders and government officials dedicated to closing racial wealth gaps and improving the financial futures of low- and moderate-income households.

We started in 1990 as the Massachusetts Community & Banking Council (MCBC) to provide a forum for Massachusetts financial institutions and community organizations to meet and share information with the goal of affecting positive change in the availability of credit and financial services in traditionally underserved communities across the Commonwealth.

MCBC has a proud history as the sponsor of *Basic Banking for Massachusetts*, the first voluntary statewide low-cost checking and savings account program established in 1994. In 1999, we developed the anti-predatory lending campaign, *Don't Borrow Trouble* that was adopted by Boston Mayor Thomas Menino and later by Freddie Mac. For over twenty-five years we have produced high-quality research reports on home mortgage lending and small business lending patterns. Those reports led to the passage of the Mortgage Lender Community Investment law in 2007 as Massachusetts became the first state in the nation to cover independent mortgage companies for community reinvestment activities.

In 2022, we changed our name to Partnership for Financial Equity and began to host an annual Financial Equity Summit.

OUR COMMITMENT TO DIVERSITY AND EQUITY

PFE is committed to creating a diverse and equitable environment and is proud to be an equal opportunity employer. PFE recruits, employs, trains, compensates, and promotes regardless of race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, veteran status, and other protected status. We believe that the more inclusive we are, the better our work will be. We aspire to build a diverse team, one that better reflects the people and communities we serve. Applicants who contribute to this diversity are strongly encouraged to apply.