

**THE FINANCIAL HEALTH NETWORK
CHIEF PEOPLE OFFICER**

<https://finhealthnetwork.org/>

The Organization

The Financial Health Network (formerly the Center for Financial Services Innovation) is the leading authority on financial health. They are a trusted resource for business leaders, policymakers and innovators united in a mission to improve the financial health of their customers, employees and communities.

Through research, advisory services, measurement tools, and opportunities for cross-sector collaboration, they advance awareness, understanding and proven best practices in support of improved financial health for all.

The Financial Health Network envisions a future where all people, especially those who are most vulnerable, have the day-to-day financial systems they need to be resilient and thrive.

Financial Health Network is a fast paced, highly collaborative environment, seeking people who share their values: Innovation; Passion; Excellence; Impact; Directness; Diversity, Equity and Inclusion.

Facts & Figures:

- **16 years** leading the financial health narrative and sharing financial health research
- **2018:** The year the Financial Health Pulse Trends Report was founded. The first benchmark survey of its kind, it offers year-over-year insights into the financial health of Americans
- **163** member organizations, serving more than 200 million Americans
- **70** companies have worked with the Financial Health Leaders program since 2017 to measure customer or employee financial health
- **250+** organizations have participated in the Financial Solutions Lab's programs
- **40+** fintechs have participated in the Accelerator, reaching 10 million consumers, including more than 5 million low-to moderate-income consumers

Core beliefs:

- **Financial health should be accessible to all.** Communities that have historically been marginalized deserve opportunities to build resilience and thrive
- **Improved financial health is good for business.** Financially healthy customers offer new opportunities for increased engagement, loyalty, and long-term revenue streams. Thriving employees result in better productivity and retention.
- **Meaningful improvements in financial health require an integrated, cross-sector approach.** A productive financial health network includes stakeholders across industries, policy influencers, and technology innovators.
- **Financial health innovation isn't just about technology.** It takes many forms, including emerging technologies like AI and machine learning, dynamic partnerships between nonprofits and the private sector, and new ways to address policy and regulation.
- **Deep consumer insights are key.** To provide better financial health offerings for customers, employees, and communities, we must measure and build solutions that meet customer needs and show impact over time.

The Role

Location: Financial Health Network has offices in Chicago (headquarters), New York City and Washington, DC - this position may be based in any of them (with frequent travel to Chicago if not based there)

Reports to: President & CEO (Jennifer Tescher)

Overview

The Chief People Officer will be an innovative and forward-thinking leader who is excited by the opportunity to support the Financial Health Network's organizational growth and ensure its status as a best-in-class workplace. They will serve on the leadership team and be a key strategic advisor for senior leadership while also focusing on high-quality execution, with the goal to sustain an organization that attracts the best people, ensures that they are highly engaged in the mission, work and culture of the organization, develops their careers and abilities, and maximizes their contributions.

Working closely with the CEO and the leadership team on both practice and strategy, they will:

- Fully align the HR function with the overall organizational strategy and values.
- Set strategy, strengthen internal talent development practices and build systems to ensure a diversity, equity and inclusion (DEI) lens is regularly in use across the organization.

Key Responsibilities

Serve as a strategic advisor to the organization on all talent and HR related topics

- Execute and continually refresh a talent and HR strategy that is aligned with, and supportive of, the Financial Health Network's overall vision and goals; ensure buy-in to the HR strategy across the organization through transparent, regular internal communication.
- Advise the leadership and staff and serve as a strong advocate for issues relating to DEI, talent and HR.
- Ensure the existence of a positive workplace environment that supports staff engagement, work/life integration and optimum productivity.
- Recommend and implement forward-thinking policies and structures designed to maximize employee engagement and experience.

Lead the organization's diversity, equity, and inclusion (DEI) strategy and initiatives and serve as an active leader and voice for diversity, equity and inclusion

- Lead the organization's DEI Committee.
- In partnership with leadership, provide vision, leadership, coordination and strategic oversight regarding equity, diversity and inclusion initiatives.
- Lead internal work on diversity, equity and inclusion and implement systems and ongoing training designed to encourage sometimes hard but necessary conversations.
- Ensure that the Financial Network's commitment to DEI is reflected, not only in our internal practices, but in our external work as well.

Build and manage an HR function aligned with the organization's values and objectives, reflecting best and emerging practices

- Motivate and provide leadership to an empowered HR team that serves as an important resource, sounding board and support to the staff at the Financial Health Network
- Design, recommend and implement service delivery strategies, including systems, staff responsibilities and outsourcing opportunities.
- Manage relationships with key external HR service providers and partners, assessing performance and value received.
- Ensure compliance with relevant employment laws and regulations.
- Identify and apply best practices and innovations to our workplace.
- Manage HR policies and maintain our Employee Handbook.

Manage the organization's employment life-cycle processes with the purpose of recruiting and engaging a diverse workforce that lives our values and who collectively will achieve our mission

- Apply a DEI lens to all job design, recruiting, staffing and transition processes and ensure that all systems support the organization's goals in these areas.
- Ensure that staff learning, effectiveness and development programs are best-in-class and seen as high priorities for the organization.
- Develop, manage and continually improve the organization's performance management process.
- Oversee the organization's total compensation policies and practices, including external benchmarking and calibration.

Play a lead role in the organization's high-performing, results-oriented culture

- Work with leadership and staff to set performance goals that align with the organization's goals and priorities, and the individual and team attributes essential to achieve them.
- Design and nurture practices and systems for evaluating and strengthening the individual and team attributes vital to achieving these goals.
- Work with staff to ensure diversity, equity and inclusion are primary in all decision making.

The Individual

The Chief People Officer will be forward-thinking, deeply connected to the mission of the Financial Health Network and have the goal of creating a best-in-class organization that recognizes talent as its most important resource. Successful candidates will have at least 10 years of relevant, progressive experience in human capital/talent development.

The ideal candidate will also have the following personal competencies and characteristics:

Experienced Talent Management and Human Resources Leader: The Chief People Officer will be a proven leader with a strong acumen for all human resources and talent management functions. This leader will have managed a human resources team within an organization and will thrive in collaborative environments that are seeking innovation and are deeply committed to diversity, equity and inclusion. They will have the proven ability to establish progressive systems and structures designed to support the development and engagement of staff and overall organizational goals.

Experienced Diversity, Equity and Inclusion Leader: Charged with supporting the organization to realize its vision around diversity, equity and inclusion, the Chief People Officer will work to nurture a transparent and compassionate culture where staff feels able to bring their full selves to work, supported and cared for both personally and professionally and able to productively and openly engage in dialogue about power, privilege and implicit bias. They will uphold the values of equity and inclusion in all systems and policies of the organization.

Relationship Builder and Collaborator: Critical to success in this role, the Chief People Officer will be skilled at building and sustaining excellent relationships across the Financial Health Network. They will be a natural partner with demonstrated ability to connect, build bridges and work collaboratively. They will be a culture carrier who models passion for the mission, a respect for people and a commitment to moving the organization forward. Through leadership and example, they will position the organization as a trusted, solutions-oriented source of support for all employees.

Adept at Change Management: The Chief People Officer will bring a background of managing significant organizational change and staff development, with a thorough, detailed and wide-ranging perspective on the impacts of these changes on the culture of an organization. They will have practical experience in communicating change to executive leadership and staff within the organization.



Bridge
Partners

Diversity, Equity and Inclusion

Financial Health Network's commitment to Diversity, Equity, and Inclusion is central to our talent acquisition approach and processes. Our mission to improve financial health for all, especially the most vulnerable, can only be accomplished through a diverse population of employees at all levels who are representative of the many communities we seek to impact.

We strive to recruit, hire, develop, empower, and retain talented individuals at all levels across various dimensions of diversity and intersectionality including, but not limited to, race, ethnicity, sexual orientation, gender identity, gender expression, religion, age, neurodiversity, disability status, veteran status, and citizenship.

We welcome and need your unique voice and look forward to having you join our team!

To learn more about this opportunity, please contact:

Tory Clarke
Partner, Bridge Partners
tory.clarke@bridgepartnersllc.com

Ryan Whitacre
Partner, Bridge Partners
ryan.whitacre@bridgepartnersllc.com