

## **Filene Research Institute: Credit Union Collaboration Advisory Services**

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### **The Big Idea**

At Filene we often hear from our members, “Your research is great, but how can I apply it to my organization? As a result we have decided to embark on a plan to help credit unions go beyond the research. The Filene Research Institute is seeking an independent contractor to lead the development of credit union collaboration advisory services. This project will apply Filene Research Institute’s existing research on collaboration with credit unions across North America. It could include working with several organizations to develop back-office efficiency or conducting one-on-one reviews of collaboration opportunities within a single credit union. You come up with the plan and work in conjunction with Filene Research Institute’s Chief Research Officer to develop a sustainable (at minimum break even) business practice after 18 months of work.

### **The Candidate**

The successful candidate will be a self-starter with an entrepreneurial spirit and proven track record in the consumer financial services marketplace and knowledge in building alliances. Candidates must be willing to fully focus on this engagement for the 18 month contract period. Frequent travel will likely be a component of this position. The candidate must be self-sufficient, as the position will likely be working remotely without direct administrative support. Must thrive working with a small staff in a start-up environment.

### **Architect It**

To be considered for this position you will need to architect a high level 18 month business plan for how you would approach this big idea. No more than two pages (plus resume and references) will be considered. Be sure to include the following:

- Budget, including your estimated contractor fee and direct expenses.
- Projected revenues.
- Business lines you would develop (and how you would utilize Filene’s research).
- A description of your qualifications.

In addition to the two pages, please include your resume and references.

### **Details, Details**

This contract shall last a maximum of 18 months.

Selection of the independent contractor will be made before November 1, 2009.

For more information on Filene Research Institute’s existing collaboration research, please visit:  
<http://filene.org/publications/content/category/collaboration>

Submit your proposal, no later than September 29, 2009 to George Hofheimer, Chief Research Officer, Filene Research Institute at [research@filene.org](mailto:research@filene.org). Please call Josey at 608-231-7513 with questions. Proposals received after midnight on the 29<sup>th</sup>, will not be considered.