

Research Council – Research Pipeline Feedback Panel

Asked twice per year in 2010 for feedback on our current pipeline of research.

Details

The Filene Research Institute maintains an ongoing research pipeline that contains 10 or more research projects at any given time. Filene seeks to keep its pipeline up-to-date and relevant for the needs of our credit union constituents. It is important to maintain an adequate mix among our four research priorities: Credit union strategy; Consumer behavior; Lifecycle; Public policy.

Filene Research Council's Pipeline Review Panel will examine pending research products and provide feedback. This includes, but is not limited to:

- Comments on existing projects.
- Suggestions for new projects or researchers.
- General feedback on the direction and scope of the pipeline.

The review process entails receiving written descriptions of the pending projects and returning feedback in writing. Filene would also host up to two conference calls of up to one hour for the Review Panel to interact with each other and with Filene staff.

Time commitment

The Pipeline Review Panel reviews research projects twice per year, ideally in the winter and summer – midpoints between the semi-annual spring and fall meetings with the full Research Council. The likely time commitment specific to the Pipeline Review Panel is between four and eight hours per year.

First date: April 7th in person in Madison, WI, or via phone

Other responsibilities

- Members maintain a commitment to attend full Research Council meetings and visit one-on-one with Filene staff approximately two times per year.
- Members maintain a commitment to respond to council-wide surveys and interact with Filene staff and researchers on an ad hoc basis.

Research Council – Participation Panel

This group would be our first responders to emails and calls for participation in research projects and to pilot i³ ideas.

Details

The Filene Research Institute engages in constant research and innovation activities among credit unions. As such, it is imperative to have credit union leaders willing to invite researchers or innovators to test new ideas. Members of the Participation Panel volunteer to receive information about each new research project and get rights of first refusal to participate, assuming their credit unions match researchers' needs.

In addition, Filene's i³ group is constantly on the lookout for credit unions willing to test new products or services. The Participation Panel will receive periodic updates and invitations from Filene innovators. Examples of successful i³ innovations (details at filene.org) include:

- Debt in Focus
- Save to Win accounts
- MatriMoney
- Savings Revolution programs

Participation Panel members are not obligated to pursue any particular project, but it is expected that they give each request due consideration.

Time commitment

Credit union-specific research arises on an ad hoc basis, so Participation Panel members agree to periodic communications when the need arises. Innovation pilot requests may arrive up to six times per year. The time commitment could range from a few hours per year for merely reviewing the opportunities to a full management commitment when one of the research or innovation ideas matches your credit union's needs.

Other responsibilities

- Members maintain a commitment to attend full Research Council meetings and visit one-on-one with Filene staff approximately two times per year.
- Members maintain a commitment to respond to council-wide surveys and interact with Filene staff and researchers on an ad hoc basis.

Research Council – Project Review Panel

Called upon up to ~ 4 times a year to read an almost finalized report and provide feedback in a timely manner.

Details

Filene is constantly contracting, reviewing, and editing new research. Despite our connections to credit unions, we are not always aware of attitudes, practices, or concerns on the ground. Accordingly, it will be beneficial to receive feedback on particular research prior to final publication.

Members of the Review Panel will get an early look at new research and have the chance to shape the tone of the report. It will be particularly useful for Filene staff and report authors to receive feedback about the report's implications for credit unions.

Time commitment

With two weeks' prior notice, Review Panel members will receive approximately one research report or brief per quarter. Each will take between one and two hours to read and respond to. Because of tight publication deadlines, we will ask for feedback approximately one week from receipt of the report.

Other responsibilities

- Members maintain a commitment to attend full Research Council meetings and visit one-on-one with Filene staff approximately two times per year.
- Members maintain a commitment to respond to council-wide surveys and interact with Filene staff and researchers on an ad hoc basis.

Research Council – New Idea Lab

Participate in surveys, conference calls, and other methods to communicate new research or innovation ideas to Filene staff.

Details

Filene needs to keep its finger constantly on the pulse of credit unions, to know what the challenges are, what the pain points are, and how credit unions can address them. To this end, members of the New Idea Lab proactively bring ideas for research and innovation to Filene staff.

Filene staff contacts New Idea Lab participants via Web surveys and follows up with conference calls among all Lab participants. Participants brainstorm via the Web potential research projects or interesting innovations they know of or would like to see. The follow-on calls with Filene staff and fellow Lab members test each idea for importance, budget constraints, and feasibility.

Time commitment

The New Idea Lab participants interact with Filene staff twice per year, ideally in the winter and summer – midpoints between the semi-annual spring and fall meetings with the full Research Council. Participation in the New Idea Lab can be a remote commitment and entails between two and four hours per year.

First date: April 7th in person in Madison, WI, or via phone

Other responsibilities

- Members maintain a commitment to attend full Research Council meetings and visit one-on-one with Filene staff approximately two times per year.
- Members maintain a commitment to respond to council-wide surveys and interact with Filene staff and researchers on an ad hoc basis.

Research Council – Filene Ambassador

*Represent Filene at system-wide events or conferences.
Help attract or retain Filene members.*

Details

Filene receives numerous requests each month for speaking engagements at credit union events. Although we do our best to accommodate each request, we cannot accommodate all. Filene Ambassadors present Filene research or insights at meetings when they have specific expertise or when Filene staff is unable to fulfill a request. Filene Ambassadors are confident public speakers and commit to preparing for select events with the help of Filene staff.

In addition, Filene Ambassadors are matchmakers. They understand the value Filene offers to credit unions and vendors. They are available and proactive in discussing membership with potential Filene members and system vendors who could support Filene in general or specific Filene projects.

Time commitment

Speaking opportunities arise on an ad hoc basis, but could entail up to three days out of the office. Similarly, outreach opportunities arise throughout the year, and the commitment could entail phone, email, or in-person communication with prospective Filene members. Not counting potential speaking engagements, Filene ambassadors may spend approximately five hours per year in that role.

Other responsibilities

- Members maintain a commitment to attend full Research Council meetings and visit one-on-one with Filene staff approximately two times per year.
- Members maintain a commitment to respond to council-wide surveys and interact with Filene staff and researchers on an ad hoc basis.