



**Filene** Research Institute 

**BEHIND THE SCENES:  
FILENE'S SIX CENTERS OF EXCELLENCE**

JULY 29, 2021



WELCOME

# TODAY'S AGENDA

- ▶ **Welcome and Introduction**
- ▶ **Overview of Filene's Six Centers of Excellence**
- ▶ **Research Pipeline**
- ▶ **Filene's Inner Circle**
- ▶ **Q&A Panel**

FACILITATED BY

**HOLLY FEARING**

Director, Marketing + Communications  
Filene Research Institute



WITH HOSTS

**PAUL DIONNE**

Research Project Manager  
Filene Research Institute



AND

**JOEL HARTZLER**

Stewardship + Development Director  
Filene Research Institute



WELCOME

# INNER CIRCLE GUESTS



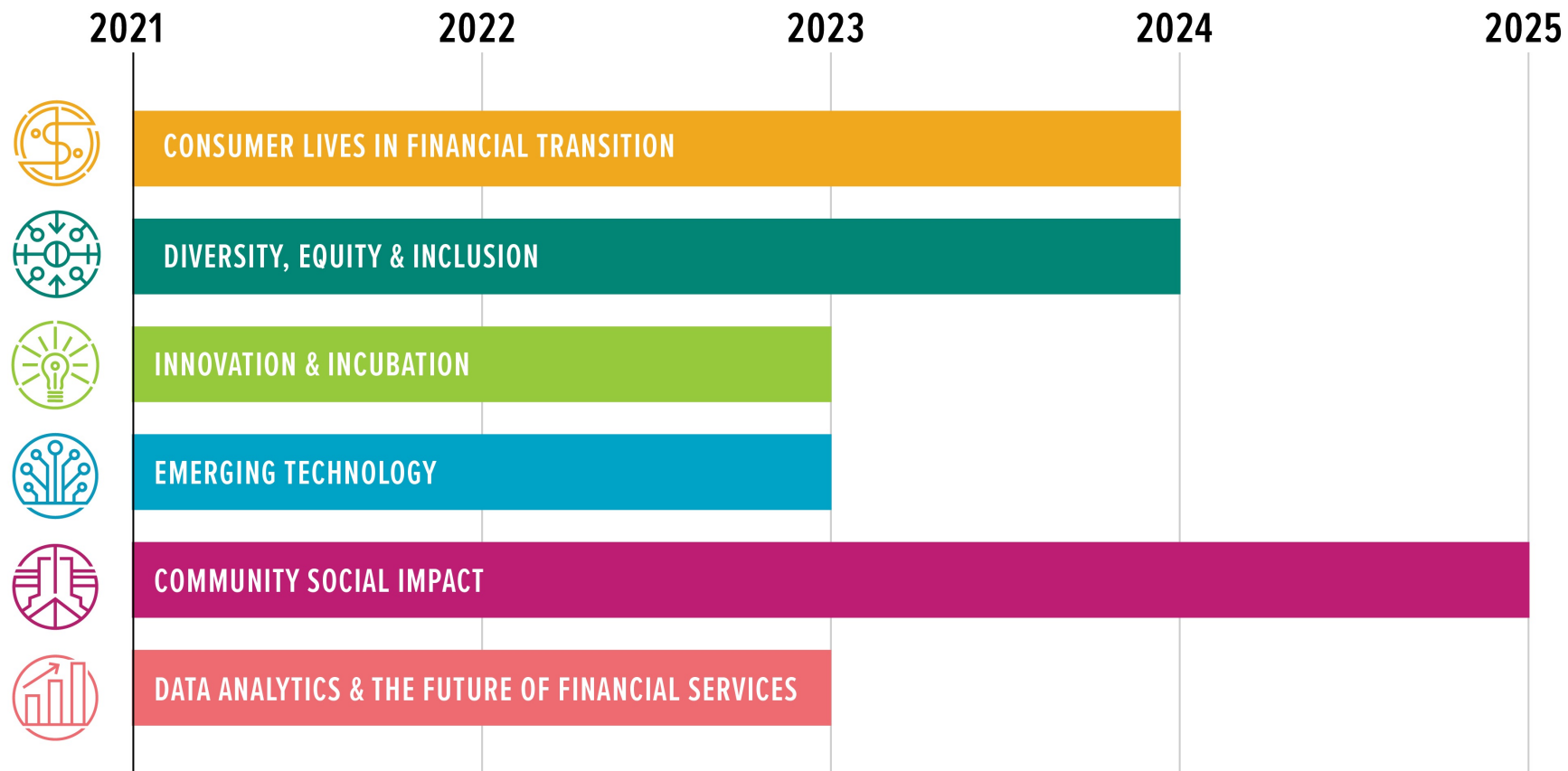
**ANDY KEMPF**  
CEO  
4Front Credit Union









**DAWN SIMON**  
VP of Marketing  
Weokie Federal Credit Union



# TIMELINE



# RESEARCH PIPELINE

 <p><b>CENTER FOR DATA ANALYTICS &amp; THE FUTURE OF FINANCIAL SERVICES</b></p>	 <p><b>CENTER FOR CONSUMER LIVES IN TRANSITION</b></p>	 <p><b>CENTER FOR DIVERSITY, EQUITY &amp; INCLUSION</b></p>	 <p><b>CENTER FOR COMMUNITY SOCIAL IMPACT</b></p>	 <p><b>CENTER FOR EMERGING TECHNOLOGY</b></p>	 <p><b>CENTER FOR INNOVATION &amp; INCUBATION</b></p>
<p>FELLOW <b>CHERI SPEIER-PERO</b></p> <p>MICHIGAN STATE UNIVERSITY</p>	<p>FELLOW <b>LISA SERVON</b></p> <p>UNIVERSITY OF PENNSYLVANIA</p>	<p>FELLOW <b>QUINETTA ROBERSON</b></p> <p>MICHIGAN STATE UNIVERSITY</p>	<p>FELLOW <b>MAI THI NGUYEN</b></p> <p>UNIVERSITY OF CALIFORNIA SAN DIEGO</p>	<p>FELLOW <b>BILL MAURER</b></p> <p>UNIVERSITY OF CALIFORNIA IRVINE</p>	<p>FELLOW <b>JEFFREY ROBINSON</b></p> <p>RUTGERS BUSINESS SCHOOL</p>
<p>SOME TOPICS</p> <p>MAPPING THE STATE OF CREDIT UNION DATA ANALYTICS</p> <p>INNOVATING DATA GOVERNANCE &amp; COOPERATION MODELS</p> <p>EXPLORING THE FUTURE OF ANALYTICS IN FINANCIAL SERVICES</p>	<p>SOME TOPICS</p> <p>THE FUTURE OF WORK</p> <p>HEALTH &amp; FINANCIAL WELL-BEING</p> <p>FINANCIAL SERVICES FOR THE JUSTICE-INVOLVED</p>	<p>SOME TOPICS</p> <p>FOUNDATIONAL LEARNING &amp; ADVANCEMENT</p> <p>ORGANIZATIONAL CHANGE</p> <p>OPERATIONAL CHANGE</p> <p>PERSONAL CHANGE</p>	<p>SOME TOPICS</p> <p>ROOT CAUSES OF POVERTY &amp; INEQUALITY</p> <p>PROGRAMS &amp; AGENCIES THAT ENABLE SOCIAL IMPACT IN THE CONSUMER FINANCE INDUSTRY</p> <p>PARTNERSHIPS TO TRANSLATE FINANCIAL SERVICES INTO PHYSICAL &amp; SOCIAL WELLNESS</p>	<p>SOME TOPICS</p> <p>DIGITAL CREDIT SCORING</p> <p>ALGORITHMIC BIAS &amp; DISCRIMINATION</p> <p>PRIVACY &amp; CYBERSECURITY</p>	<p>SOME TOPICS</p> <p>BUSINESS MODEL INNOVATION</p> <p>CULTURES OF INNOVATION</p> <p>PRODUCT DEVELOPMENT &amp; SERVICE DESIGN STRATEGIES</p>

BEHIND THE SCENES

# FILENE'S INNER CIRCLE

Everything we do starts with research.

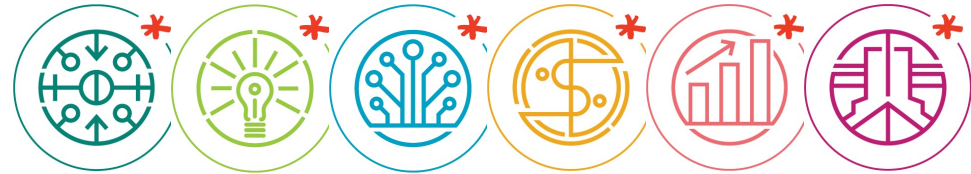
Filene's Centers of Excellence tackle the big, bold and very real issues to help you **think forward**.

But research alone cannot drive change. As part of our Inner Circle, you not only get VIP access to research, communities, events and innovation, but also connection with like-minded leaders for open-ended and creative conversations to **drive action** and **change lives**.



FILENE'S

## Inner Circle



# ENGAGEMENT

## INTERNAL ENGAGEMENT

- Quarterly alignment meeting
- Filene 101 with overview of membership benefits
- Ongoing updates on current research outputs and events

## RESEARCH ENGAGEMENT



### INNER CIRCLE (ONE ASSIGNED SEAT)

- Two face-to-face meetings per year (June and BBM)
- Optional participation on Think Tank calls led by Fellows



### THINK TANK (APPLICATION BASED)

- One face-to-face meeting per year at BBM and one Research event of choice
- Attend two monthly conference call led by a Fellow per year
- Three year term



### INCUBATOR (PRIORITY ACCESS)

- First access to participate in testing
- Visibility to incubation results and outputs
- Invites to incubator events

## INDUSTRY ENGAGEMENT

- Two to three Research Outputs per year beginning with position paper
- FAQ document as part of Fellow introduction
- Press Releases scheduled to announce Center and at launch
- Podcast and webinar to get to know Fellow





# Q & A



UPCOMING

## 2021 EVENTS

**AUGUST 9–10**  
IN PARTNERSHIP WITH DCUC

**EMERGING TECHNOLOGY +  
INNOVATION & INCUBATION**

**NAPLES, FL (HYBRID)**

**CIO/CTO &  
COO**

**OCTOBER 26–28**

**BIG.BRIGHT.MINDS.**

**IRVINE, CA (HYBRID)**

**CEO & TEAM**

UPCOMING

## WEBINARS

**AUGUST 05**

**BEYOND THE CHECK: FROM TRANSACTIONAL GIVING TO TRANSFORMATIONAL IMPACT**

**AUGUST 19**

**THE CLOUD AND CYBERSECURITY CONTINUUM – WHERE ARE YOU?**

[FILENE.ORG/EVENTS](https://filene.org/events)

ANNUAL MEMBER ENGAGEMENT EVENT

**JOIN US OCTOBER 26–28**

**HYBRID EVENT**

**CONNECT  
IN-PERSON  
AGAIN!**



**IRVINE, CA**

VIRTUAL PARTICIPATION  
IS AVAILABLE TO THOSE  
UNABLE TO TRAVEL!

**Filene's signature event is returning  
in-person, bigger and brighter in 2021!**

ANNUAL MEMBER ENGAGEMENT EVENT

**big.bright.minds.2021.\***

**IN-PERSON SPACE IS LIMITED!**

**REGISTER AT [filene.org/events](https://filene.org/events)**

ACKNOWLEDGMENTS

# THANK YOU TO FILENE'S INNER CIRCLE



ACKNOWLEDGMENTS

# THANK YOU

Thank you to Filene's Inner Circle and all of Filene's contributing members for making this research possible.

Have questions or comments about today's presentation?

Contact Filene's Stewardship + Development Director.

**JOEL HARTZLER**

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