

JEREMY M. SMITH

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SUMMARY OF QUALIFICATIONS

- ❖ Extensive experience in leading, designing, and developing innovative policy programs in the public and nonprofit sectors, with a particular focus on financial services for underserved populations.
- ❖ Experienced manager who develops and motivates staff to achieve objectives; effective team player who is able to establish productive relationships with staff and external partners to gain support for initiatives.
- ❖ Demonstrated ability to provide strategic advice and guidance to senior executives and policy makers and to represent large national organizations to a wide variety of external audiences.

PROFESSIONAL EXPERIENCE

The Aspen Institute, Financial Security Program

2015-Present

Associate Director

- Responsible for overseeing all aspect of strategic and operational aspects for retirement policy for Aspen's Financial Security Program.
- Develop and execute a series of high-profile dialogues and events to advance innovative policy solutions to build retirement wealth and to promote greater family financial security.
- Lead the research, development, and creation of a set of reports and other publications that analyze emerging issues that impact household financial well-being.
- Establish and coordinate partnerships with a broad range of public and private organizations to build support for pragmatic policies that advance program goals.

Pew Charitable Trusts

2011-2013

Senior Officer, Family Economic Security

- Created and developed new research and advocacy campaigns for the Pew Center on the States
 - Designed a new research program to explore retirement and other savings issues, as part of a broader effort to promote economic security for American families.
 - Led the successful development of a three-year, \$10.5 million research initiative to improve understanding of the intersections between federal and state policy, with a particular focus on fiscal issues.
 - Created and launched a \$3 million research project to explore the changing landscape of immigration policy in the states and the potential impact of comprehensive federal reforms.
- Directed and conducted evaluations of potential issue areas for Pew investment; evaluated political feasibility, state of research for new research and advocacy programs; prepared proposals and made recommendations for the approval of Pew's Board of Trustees present recommendations to senior Pew leadership.
- Managed a team of dedicated staff to conduct explorations of new initiatives for Pew; oversaw the performance of external research consultants.

Service Employees International Union

2006-2011

Deputy Director, Government Relations

- Principal staff advisor to SEIU President on the National Commission on Fiscal Responsibility and Reform (Simpson/Bowles Commission) and for Secretary/Treasurer on the President's Economic Recovery Advisory Board.
- Built and led team which developed and advocated SEIU policy positions to senior officials in the White House and throughout the Executive Branch.
- Played key role in the expansion and oversight of Government Relations department from nine to more than thirty staff, adding new functions and units, recruiting, hiring and supervising staff.

Special Projects Supervisor

- Led launch and roll-out of SEIU's national Financial Services Program, which offered affordable financial services and related benefits for low-income members.
 - Lead technical expert on team that negotiated multi-year contract with credit card provider.
 - Managed day to day implementation of all aspects of credit card and pre-paid debit card programs.
 - Designed pilot project on free tax preparation and Earned Income Tax Credits for SEIU members.
 - Conducted focus groups and other research to inform project design.
 - Developed training program and conducted training sessions for local union staff.

US Agency for International Development

1995-2005

Finance and Education Team Leader, USAID/Mexico

- Designed \$11 million financial services strategy, with a focus on rural and micro-finance.
- Identified and developed strategic objectives and performance indicators, and managed program to successfully meet overall goals.
- Managed \$8 million annual team budget and supervised a team of professional staff and consultants.

Microenterprise Advisor, Bureau for Latin America and the Caribbean

- Designed five-year, \$11 million regional microenterprise strategy.
- Developed and managed individual projects within overall strategy.
- Monitored performance of contractors and grantees.
- Designed and taught microenterprise component of USAID staff training course.
- Latin America regional technical expert for family remittances (money transfers), including:
 - Wrote USAID's first policy options paper on the issue and designed pilot program to leverage remittances for economic development;
 - Advised USAID Missions on developing remittance strategies and programs.

Transitions Coordinator, Bureau for Africa

- Country Development Officer for Rwanda, Burundi, Kenya, Sudan, and Eritrea.
- Wrote numerous reports, briefings, speeches and policy papers for senior management, and took lead on writing key sections of USAID's annual Congressional Budget Justification.
- Project Coordinator for the Famine Early Warning System (FEWS) Project; provided all aspects of program and management support.

US Department of Agriculture

1993-1995

Development Specialist, Foreign Agriculture Service

- Coordinated inter-agency agreements to provide USDA technical experts for international agricultural development programs.

PUBLICATIONS

Financial Access for Immigrants: Lessons from Diverse Perspectives. Anna Paulson, Audrey Singer, Robin Newberger, and Jeremy Smith. 2006. Federal Reserve Bank of Chicago and the Brookings Institution.

Making Money Transfers Work for Microfinance Institutions: A Technical Guide to Developing and Delivering Money Transfers. Jennifer Isern, William Donges, and Jeremy Smith. 2006. Consultative Group to Assist the Poor/The World Bank.

EDUCATION

The University of Texas at Austin, *Master of Business Administration & Master of Arts, Latin American Studies, 1993.*

Georgetown University, *Bachelor of Arts, History, 1986.*

SKILLS AND OTHER EXPERIENCE

Language: Spanish – fluent.

Other: President, Board of Trustees, School for Friends (Washington, DC independent pre-school), 2012-present.