



Callahan & Associates Member Experience Roundtable Attendee Information

March 19-20, 2018

Charlie Allen, AVP, Member Experience

Christian Community Credit Union (\$653M, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? 21 years.

What is your primary role & responsibilities?

I have been in most every member position during my career at CCCU so I understand the needs of the member as well as the needs and wants of the frontline staff. I started as the Receptionist, Teller, New Accounts Rep, Call Center Rep, Call Center Supervisor and then Manager to Assistant Vice President, Member Service overseeing all lobby staff MSR's and Tellers, call center and all member support teams. A few years ago, I was given the opportunity to extend my position credit union wide as AVP, Member Experience. It

all has been quite a fun journey.

In my free time, I enjoy... Taking walks and being outside.

Cissi Reagan, VP, Sales and Service

ORNL Federal Credit Union (\$1.9B, TN)



How long have you been with your credit union (and any relevant experience you'd like to share)? 24 years in September.

What is your primary role & responsibilities?

In my free time, I enjoy... Spending time with family, camping, and hiking.

Debra Vollmer, SVP, Chief Experience Officer

Langley Federal Credit Union (\$2.5B, VA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been at Langley for 14 years. I've been a Senior Vice President since 2012 and Tom just added Chief Experience Officer to my title.

What is your primary role & responsibilities? Branches, Contact Center, Marketing and the overall Member Experience. Currently I'm also in charge of the core conversion.

In my free time, I enjoy... Spending time with my Grandkids and kayaking with my husband.

Janita Clausell, SVP, Chief Member Experience Officer

ORNL Federal Credit Union (\$1.9B, TN)



How long have you been with your credit union (and any relevant experience you'd like to share)? This will be my 28th year.

What is your primary role & responsibilities? Branch network – traditional, pod, retail and universal model. In addition to the Branch network, the Call Center and Wealth Management report up through me.

In my free time, I enjoy... Spending time with my grandchildren.

Jason Moss, Chief Retail Officer

Grow Financial Federal Credit Union (\$2.4B, FL)



How long have you been with your credit union (and any relevant experience you'd like to share)? 6 years.

What is your primary role & responsibilities? I've worked in the banking industry (both banks and credit unions) for 18 years.

In my free time, I enjoy... Spending time with my family (wife and 8-month-old son), outdoor activities like golf and traveling.

Jenna Kaczmarek, COO

Patriot Federal Credit Union (\$591M, PA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Patriot FCU for 5 years.

What is your primary role & responsibilities? I worked in the credit union industry for over 25 years ranging in positions from teller to loan officer to CEO and most recently COO that oversees all branches and credit recovery/asset protection.

In my free time, I enjoy... Spending time with my family and creating and preserving many family traditions – including my love of decorating. Either I am on the soccer field watching my son, the football stadium watching my daughter in college band or traveling to a new little town I have never been to explore all the wonders it has to offer.

Jennifer Delisle, Member Experience Specialist

Worker's Credit Union (\$1.6B, MA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been employed with Worker's Credit Union for just under 20 years.

What is your primary role & responsibilities? I've worked 19 years in member facing branch positions. This has allowed me to use my skills and knowledge to offer recommendations to help improve and streamline processes and procedures to ensure top notch member experience through all channels; online, over the phone and in the branches.

In my free time, I enjoy... Snowmobiling and camping with family and friends.

Jimmy Lovelace, VP of Branches

Community First Credit Union of Florida (\$1.5B, FL)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Community First for 3 years with over 10 years of previous banking experience with Bank of America.

What is your primary role & responsibilities? As the VP of branches, I am responsible for our branch network (18 branches), our branch operations department, and our business deposit initiatives. I was recently given our member service contact center as well.

In my free time, I enjoy... In my free time I enjoy spending time with my family, traveling, and I play drums in a blues band.

Katie Grindeland, VP, Marketing

TruStone Financial Federal Credit Union (\$1.3B, MN)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been at TruStone Financial for six years.

What is your primary role & responsibilities?

In my free time, I enjoy... Being with my husband and children, reading, working, being outdoors, etc.

Kelly Jones, VP, Branch Operations

Johns Hopkins Federal Credit Union (\$436M, MD)



How long have you been with your credit union (and any relevant experience you'd like to share)? I am the Vice President of Branch Operations with Johns Hopkins Federal Credit Union (JHFCU).

What is your primary role & responsibilities? JHFCU provides financial services to the employees, students, and family members of the Johns Hopkins Community which includes Johns Hopkins Hospital and University, as well as other Johns Hopkins affiliates. I oversee our Branches, Lending, and Collections functions. I have over 30 years' experience in the Credit Union Industry, most of those years having been spent at JHFCU.

In my free time, I enjoy...

Laurie Flanders, AVP, Sales, Leadership, and Accountability

Army Aviation Center Federal Credit Union (\$1.2B, AL)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with my current credit union since October of 2017, but I have been in the credit union industry since 2014 and in the financial industry since 2007.

What is your primary role & responsibilities? I joined the credit union world in a risk and compliance capacity, but with the vast amount of customer/member experience knowledge that I possess it became evident very quickly that I was meant to be in a role where I could have a bigger impact on the experience of our members. Once this was determined, I was asked to take over the sales and operations of 11 branch locations. It

became obvious to me that our frontline staff needed a bit more structure and guidance in the act of providing an experience for a member not just taking an order. So, I wrote and trained a prescribed member experience process for my credit union to include frontline, contact center, virtual tellers, and back office.

In my free time, I enjoy... Taking care of myself. As a mom and wife with a very demanding career, it becomes easy to forget to care for myself. In 2015, I decided to join a CrossFit gym and haven't looked back since. My fitness journey makes me a better mom, wife, and leader.

Lisa Marie Meyer, SVP Director of MN Branches

TruStone Financial Federal Credit Union (\$1.3B, MN)



How long have you been with your credit union (and any relevant experience you'd like to share)? 4 years CU and 20 years banking.

What is your primary role & responsibilities? SVP, Director of MN branches.

In my free time, I enjoy... Being with my family and friends.

Mathew Van Ormer, Director of Member Experience

Listerhill Credit Union (\$755M, AL)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Listerhill for 7 years.

What is your primary role & responsibilities? During my time with Listerhill, I've been a Loan Officer, the Director of Financial Literacy, and currently the Director of Member Experience.

In my free time, I enjoy... Woodworking, working on my house, and reading.

Michael Kadel, SVP/Chief Experience Officer

Santa Clara County Federal Credit Union (\$725M, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Less than a year.

What is your primary role & responsibilities? Chief Operating Officer – Marketing/all operational functions/branches report to me.

In my free time, I enjoy... Hiking/traveling

Patti Dixon, VP, Member Experience

BCU (\$2.9B, IL)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Pete VanGraafeiland, SVP, Member Services

Local Government Federal Credit Union (\$1.9B, NC)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with LGFCU for 4 years, but in the credit union industry for 17.

What is your primary role & responsibilities? I oversee member services which includes our call center and digital banking operations. My background has been in lending, specifically consumer and indirect lending

In my free time, I enjoy... Spending time with family as I have two boys Bo (5) and Max (3) and one American foxhound Huckleberry (2). My wife is an economics professor at

NCSU and we enjoy playing golf and tennis.

Renee Lucas, VP, Member Experience

Clearview Federal Credit Union (\$1.7B, PA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Clearview FCU – For a long time! (1980 or 37 years) but I don't usually tell new hires because then they know I am very old. JK

What is your primary role & responsibilities? Clearview has been focusing on Member Experience and in 2017 made it a Key Initiative. We are currently partnering with Matt Purvis Management who is a business leader that is helping us to drive our member experience through brand culture, workshops, strategic planning, and leadership development. I am spearheading the cultural shift from Exceptional Member Service to brand animation and Member Experience.

In my free time, I enjoy... Spending time with my husband Jim, and my daughter Rachel. I also enjoy Glamping (camping) with family and friends at our summer place at Pymatuning Lake during spring and summer months. My dad was an Artist and over the past two years, I have been working with several family members to promote his masterpieces and eventually make an unknown artist famous.

Ruth Leavitt, VP, Member Experience

Infinity Federal Credit Union (\$337M, ME)



How long have you been with your credit union (and any relevant experience you'd like to share)? Two and a half years – I've spent many years in retail banking prior to Infinity FCU.

What is your primary role & responsibilities? I manage the branches, business development team, and the call center.

In my free time, I enjoy... Gardening and other outdoor activities.

Shelley Mullet, Director, Sales and Service

Georgia's Own Credit Union (\$2.3B, GA)



How long have you been with your credit union (and any relevant experience you'd like to share)? 6 years.

What is your primary role & responsibilities? Midflorida Credit Union for 4 years. Worked in Mortgage Sales and Sales Management for 14 years prior to Georgia's Own Credit Union.

In my free time, I enjoy... Traveling, the beach, and watching my son play golf.

Tracey Wheeler, SVP/CMEO

Vision's Federal Credit Union (\$4B, NY)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Alix Patterson, Partner

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? Almost 20 years with two sabbaticals – one to get married (2001) and one to do a one-year MBA program at Oxford University (2005/6).

What is your primary role & responsibilities? I am one of four Partners at Callahan and currently oversee what we refer to as the “core business” – all our software, publications, and events – along with the marketing & engagement team. I also do quite a few speaking and consulting engagements each year, as do the rest of the Partners!

In my free time, I enjoy... Binge watching shows while cooking (thank you Scott for the wireless headphones/iPad set up in the kitchen!), photography, reading and attending my kids sporting events. I have a bad habit of succumbing to Amazon book sales and have 72 unread books on my Kindle.

Scott Sturkie, Director, Account Management and Sales

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Callahan & Associates since March 2016.

What is your primary role & responsibilities? As a member of Callahan's Account Management team, I am responsible for supporting large enterprise credit unions. Consistent contact with credit unions helps Callahan succeed as the leading provider of data and information to the industry.

In my free time, I enjoy... Spending time with my family, taking in new experiences and trying to keep up with my two young daughters!

Victoria Taylor, Marketing & Engagement Manager

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Callahan & Associates for 7 years. Before that, I worked for a management consulting company on their client engagement team.

What is your primary role & responsibilities? As a member of Callahan's marketing team, I focus on email communications with clients and prospects, digital and web strategies, social media (LinkedIn), and media outreach. I also manage the team that plans, recruits, and executes all our events like this Roundtable, training boot camps, and webinars. I am one of Callahan's remote employees and work from home in Greensboro, North Carolina.

In my free time, I enjoy... My husband and I just bought our first home in August 2018, so I spend a lot of my time looking at furniture online and mowing my new yard (.33 acres!), and learning to be a good homeowner. I love to listen to Podcasts (especially true crime), travel, and cook/try new recipes. I am also obsessed with my dog.