



Callahan & Associates Call Center Roundtable Attendee Information

April 17-18, 2018

April Cooper, Member Connect Manager

Northwest Community Credit Union (\$1.1B, OR)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with the credit union 18 years.

What is your primary role & responsibilities? I have been in a supervisor/manager role in the call center for 12 years.

In my free time, I enjoy... Hiking, camping, and hunting with my husband and two boys (12 & 9).

Brenda Jackson, VP, Branch Operations

1st MidAmerica Credit Union (\$722M, IL)



How long have you been with your credit union (and any relevant experience you'd like to share)? Brenda Jackson is the VP of Branch Operations at 1st MidAmerica Credit Union in Illinois.

What is your primary role & responsibilities? She has been in the credit union industry for over 36 years holding positions from teller to CEO. Brenda has been in her current position with 1st MidAmerica for over 15 years. She plays an active role in branch expansion and oversees the areas of branch

operations, call center and document imaging area.

In my free time, I enjoy...

Chris Sundlof, VP, Member Experience

Arlington Community Federal Credit Union (\$294M, VA)



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

What is your primary role & responsibilities? Board member of the Metro Area Credit Union Management Association (MACUMA)

In my free time, I enjoy... Building guitars. Here's my side business www.sundlofguitars.com.

Daniel Johnson, Call Center Manager

NASA Federal Credit Union (\$2.2B, MD)

Desiree White, ECR

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)? Employed with LGFCU for five years upon retiring from a career in local government human resources.

What is your primary role & responsibilities? Spent many years promoting and encouraging credit union membership to local government employees as human resources director. I am employed currently in the Member Services Division of Operations and a student at NCSU pursuing a certificate in professional writing.

In my free time, I enjoy... Spending time with my children, ministry and working on

my book.

Fermin Parra, AVP, Member Experience Group

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

Gaylene Dizmang, VP Member Service

Blue Federal Credit Union (\$964M, WY)



How long have you been with your credit union (and any relevant experience you'd like to share)? 18 ½ years – Since June 1999.

What is your primary role & responsibilities? Marketing, Business Development, Branch Operations and Sales and Service roles. Currently, Gaylene is responsible for Blue Federal Credit Union's 13 branches and Contact Center. Gaylene has a Bachelor's degree in Business Administration from Regis University and is a graduate of Western CUNA Management School and Mountain West Credit Union Association Leadership Institute.

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

George Mitchell, EVP, COO

Keesler Federal Credit Union (\$2.5B, MS)

James Borrelli, Member Experience Officer

Affinity Federal Credit Union (\$2.9B, NJ)

James Urban, Director, Sales and Service Center

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)? 2 years.

What is your primary role & responsibilities? Member calling experience, efficiency, service level and utilization management.

In my free time, I enjoy... Reading, working in the yard, dining out.

Janice Bryant, AVP, Retail Efficiencies

SRP Federal Credit Union (\$857M, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)? 33 ½ years.

What is your primary role & responsibilities? Retail, Deposit Services, Management, Operations. Currently AVP of Retail Efficiencies and recently assigned our Phone Center under a reorganization.

In my free time, I enjoy... College Sports, home improvement projects, going to the lake and beach in the summer.

Jason Carter, Director, Member Care

TDECU (\$3.1B, TX)



How long have you been with your credit union (and any relevant experience you'd like to share)? Since January 2017.

What is your primary role & responsibilities? I have lead several large-scale call center operations in varying industries for the past 20+ years (United Healthcare; Verizon Wireless; Mercer).

In my free time, I enjoy... Woodworking, Football, and doing anything outdoors.

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... Being with my family and friends.

Kristi Forehand, AVP, Contact Center

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)? 12 years.

What is your primary role & responsibilities? Prior to becoming AVP of Contact Center I have fulfilled the positions of Sales and Service Leader, Branch Manager and Trainer

In my free time, I enjoy... Spending time with family and my precious beagle Sadie.

Laura Gudzikowski, VP, Central Operations

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)? At the time of the Roundtable, it will be exactly 3 months.

What is your primary role & responsibilities? This is my first time having a Call Center report to me, so I'm looking forward to learning everything I can.

In my free time, I enjoy... Hiking in Northern California and traveling anywhere, especially with family.

Linda Cox, Director, Service Center and Facilities

Eastman Credit Union (\$4B, TN)



How long have you been with your credit union (and any relevant experience you'd like to share)? 38 years.

What is your primary role & responsibilities? Started working at ECU as a teller and I've had many opportunities within the organization since then.

In my free time, I enjoy... Relaxing.

MaryAnn Plummer, Call Center Manager

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 have been with Johns Hopkins FCU for 19 years.

What is your primary role & responsibilities?

In my free time, I enjoy... Gardening.

Sandra Covington, VP, Member Service Center

Tower Federal Credit Union (\$2.9B, MD)



How long have you been with your credit union (and any relevant experience you'd like to share)? 19 years.

What is your primary role & responsibilities? Financial Industry 34 years, Branch experience.

In my free time, I enjoy... Reading self-help material, watching movies, spending time with family

Tim Kelly, EVP, Member Service

Virginia Credit Union (\$3.4B, VA)

Katy Slater, Senior Vice President

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? Katy Slater, Senior Vice President for Callahan & Associates, has over 25 years of experience working with the nation's largest credit unions and CUSO suppliers providing strategic direction and leadership. She has been connecting with audiences on the national platform through insightful and informative speaking engagements for more than two decades.

What is your primary role & responsibilities? Katy has held senior management positions in finance/auditing, operations, product development and marketing, giving her a keen ability to understand all angles of the industry. She is a proven strategic leader with a demonstrated ability to develop success strategies as well as implement strategic vision.

In my free time, I enjoy... Spending time with her husband (Todd), two children (Megan and Emily), and Aussiedoodle.

Scott Sturkie, Director, Account Management & 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 and strategy 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 bootcamps, 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 a house, so I spend all of my free time unpacking boxes, looking at furniture online, mowing my new yard (.33 acres!), and learning to be a good homeowner.