



## Callahan & Associates HR Roundtable Attendee Information

July 31-Aug. 1, 2018

### **Amy Thomas, VP, People and Culture**

*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)?** Amy's professional experience ranges from supporting Fortune 100 companies to include ARAMARK and DIRECTV, to small businesses and start-up ventures that include ICOR Partners, LLC, Noggin Nannies, LLC, and most recently, Arlington Community Federal Credit Union.

**What is your primary role & responsibilities?** A results-oriented professional with eleven years of proven success in human resource management, consulting, and coaching. Amy has wide-ranging experience in areas of human resource management, organizational development, corporate recruiting, and human capital operations. She

exhibits proactive leadership and encompasses a spirit of entrepreneurship and innovation with a unique ability to influence business partners, clients and employees.

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

### **Ann Robbins, SVP, Human Resources**

*Charlotte Metro Credit Union (\$468M, NC)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Since May 2000 [18 years].

**What is your primary role & responsibilities?** HR, Leadership Development, Talent Acquisition, Development and Retention, Employee Engagement, Executive Succession Planning.

**In my free time, I enjoy...** [crafts, shopping, the beach and my granddaughters!]

**Bruce Brady, CHRO**

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 10 plus years.

**What is your primary role & responsibilities?** CHRO – HR, Training and Director of Member Loyalty.

**In my free time, I enjoy...** Running, Racquetball, Biking, and camping.

**Carol Wagner, CAO**

*LGE Community Credit Union (\$1.2B, GA)*

**Carrie Fredenburg, HR Director**

*Bellco Credit Union (\$4B, CO)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 8 years.

**What is your primary role & responsibilities?** Manage the HR department which includes benefits, recruiting, employee relations, compensation and payroll.

**In my free time, I enjoy...** Playing golf with my husband.

**Colleen Browne, CPO**

*CommunityAmerica Credit Union (\$2.5B, KS)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 2 ½ years.

**What is your primary role & responsibilities?** All things “people” inside and outside of CommunityAmerica. Responsible for all HR functions including benefits, payroll, employee relations, engagement, retirement, training & development, etc. Additionally, I am responsible for the CommunityAmerica Foundation which oversees our charitable giving and volunteer programs.

**In my free time, I enjoy...** Spending time with my family at our lake home enjoying the outdoors.

**Damita Robinson, SVP, Human Resources**

*Andrews Federal Credit Union (\$1.5B, MD)*



**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...**

## **Edie Mitchell, AVP, Learning and Organizational Development**

*Canvas Credit Union (\$2.2B, CO)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Celebrating 2 years as of July 18.

**What is your primary role & responsibilities?** I lead our talent management function which encompasses recruiting/talent acquisition, the design and execution of purpose-driven employee experiences from New Employee Orientation, learning targeted for new branch staff, other professional development skill and competency-building workshops and programs for employees across Canvas, management and leadership development for people managers at all levels. I drive the design of a consistent approach to talent assessment and succession planning and other people/culture-focused initiatives in service to our employees.

**In my free time, I enjoy...** Spending time with my family (husband, teenage son and dog, Maurice) and friends near and far. I am an avid indoor cyclist and deeply passionate about music. My passion project this year is to launch my long-awaited music blog, [mixtapemaven.com](http://mixtapemaven.com), where I can write about songs that have inspired me and the memories/people associated with them. I also serve on the Board of Directors of the Arapahoe Philharmonic.

## **Jason Cortney, VP, HR**

*UniWyo Federal Credit Union (\$313M, WY)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with UniWyo Federal Credit Union for 13 Years as the Vice President of Human Resources.

**What is your primary role & responsibilities?** I'm responsible for the recruitment of staff, benefit administration and salary administration, as compliance with employment law.

**In my free time, I enjoy...** In my spare time you can find me with my family enjoying the outdoors!

**Julia Sohn, VP, Human Resources**

*SchoolsFirst Federal Credit Union (\$14B, CA)*



**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?** Human Resources, all facets of the team member life cycle with the exception of training.

**In my free time, I enjoy...** Anything DIY and treasure hunting (in antique stores and estate sales).

**Julie Cosgrove, SVP, HR**

*Affinity Plus Federal Credit Union (\$2B, MN)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with Credit Union of Colorado 10 years.

**What is your primary role & responsibilities?** The SVP of People and Planning is responsible for providing strategic leadership for the company by working with the senior management team and volunteers (Board of Directors and Supervisory Committee) to establish long-range goals, strategies, plans and policies. The role is also responsible for developing and executing human resource strategy in support of the overall business plan and strategic direction of the organization, specifically in the areas of workforce and succession planning, talent

management, change management, organizational development and performance management, learning and development, employee relations/legal issues, employment compliance and compensation. The role provides strategic leadership by articulating HR needs and plans to the executive management team, internal stakeholders and the board of directors.

**In my free time, I enjoy...** Swimming, trips to the mountains, interior decorating and gardening and many volunteer leadership roles in my community.

**Keith Smith, SVP Human Resources/Chief Talent Officer**

*Partners Federal Credit Union (\$1.6B, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with Partners 2 years. Previously I was HR at Vista FCU in the late 90's prior to our merger with Partners, and have been with the company for 26 years in various divisions, primarily Parks and Resorts HR.

**What is your primary role & responsibilities?** As the Chief Talent Officer, I serve as a strategic partner to senior leadership, and provide the foundation for programs and initiatives that support the Partners Cast. Leading the HR teams that assess business needs, develop solutions and execute talent initiatives, I have responsibility for the HR Business Partners, talent planning, recruitment and retention, leadership and

professional development, organizational effectiveness and helping the Partners team create and sustain a dynamic, energized work culture and experience.

**In my free time, I enjoy...** Travel, volunteering and the performing arts

**Mary Hoffman, VP, CPO**

*Ardent Credit Union (\$645M, PA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Have been with Ardent 8.5 years.

**What is your primary role & responsibilities?** Oversee all aspects of HR/OD, including Recruiting, Benefits, Ardent University, Employee Relations, Payroll, etc.

**In my free time, I enjoy...** Going to the beach (summer) and traveling whenever I get the chance! Also, love a good book or a good comedy!!



**Stacy Maatman, VP, HR**

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 13 years.

**What is your primary role & responsibilities?** Oversee Human Resources, Training as well as Member Loyalty programs and the Director of Member Loyalty.

**In my free time, I enjoy...** Camping and gardening.

**Trish Kordas, Chief Culture Officer**

*Tucson Federal Credit Union (\$434M, AZ)*

**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.

## Alexandra Selby, VP, Marketing

*Callahan & Associates*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Alexandra (Alex) is vice president of marketing & engagement. She leads a team of marketers and communication specialists at Callahan & Associates. With more than 7 years of credit union experience, Alex helps shape the positive interactions between Callahan and its current and prospective clients.

**What is your primary role & responsibilities?** A frequent contributor to CreditUnions.com, Alex also represents the organization across the country at industry events, providing insights and thought leadership on key areas such as brand management, peer financial analysis, key credit union trends, and more. She is passionate about improving credit union performance and using data to solve problems.

**In my free time, I enjoy...** Alex recently moved to San Francisco with her husband. In her free time, she enjoys spending the weekends exploring with her husband and puppy, Gatsby.

## 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 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 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.