



Callahan & Associates HR Roundtable Attendee Information

October 24-25, 2018

Pete Montalvo, Senior Director of Human Resources

AEA Federal Credit Union (\$248M, AZ)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with AEA Federal Credit Union since July 23, 2018 (3 months).

What is your primary role & responsibilities? I am the Senior Director of Human Resources/ Learning and Development. I oversee every aspect of human resources, i.e. staffing, employee relations, benefits, policies, procedures, etc., along with all aspects of training.

In my free time, I enjoy... Taking care of and doing things with my children, cooking, working out, hiking, trying new things, traveling, etc.

Sue Heyen, SVP, Human Resources and Training

Credit Union 1 (\$826M, IL)



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

What is your primary role & responsibilities? As a Sr. VP on the Executive Team, I oversee the human resource and training & development operations as well as work with the team on strategic goals, mission and culture.

In my free time, I enjoy... Relaxing/playing with my dachshund Snickers and spending time with family.

Erin Fuller, VP, Human Resources

Empower Federal Credit Union (\$1.6B, NY)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been at Empower for 2 ½ years, but before that I was with Altura C.U. for 23 years.

What is your primary role & responsibilities? V.P. Human Resources over HR and Training with a few other administrative responsibilities.

In my free time, I enjoy... I love to shop and go out to dinner. Living in the Northeast, I cherish the sun too☺.

Michelle Frattolin, VP, HR

First Entertainment Credit Union (\$1.4B, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Michelle Frattolin has progressive experience in the field of human resources and is a contributing member of the senior management team as the Vice President of Human Resources at First Entertainment Credit Union. Michelle joined the credit union in July 2008. She has extensive human resources and credit union industry knowledge, holding an executive position for the past fifteen years. Prior to joining the credit union industry, Michelle worked in human resources in both the automotive and re-insurance industries.

What is your primary role & responsibilities? Currently, Michelle oversees all aspects of Human Resources, including employee training/development, compensation, benefits, employee relations and recruitment.

In my free time, I enjoy...

Angela Howorth, VP, HR

Generations Federal Credit Union (\$546M, TX)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Generations Federal Credit Union since I graduated from college which is 22 years ago. I have learned so much throughout the years. I love my job and the people that work for the credit union.

What is your primary role & responsibilities? VP of Human Resources – I am responsible for the strategic leadership and direction of Human Resources. I oversee compensation, benefits, performance management, recruitment,

corporate learning, and employee engagement.

In my free time, I enjoy... Traveling, painting, floral arranging, and eating great food.

Kimberly Duffy, VP, HR and Learning

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)? I have been with Georgia's Own only 2 years.

What is your primary role & responsibilities? I oversee all of HR & Learning (ER, recruiting, benefits & payroll, comp, training & dev).

In my free time, I enjoy... Being with my 11-year old son and trying new recipes. Love to cook!

LeeAnne Giblin, Chief Human Resource Officer

KeyPoint Credit Union (\$1.2B, CA)

Heather Swann, VP, People Operations

Listerhill Credit Union (\$755M, AL)



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? I am responsible for setting strategic goals for the People Operations Department as a whole. This includes working with my HR Specialists in the areas of recruitment, benefits, wellness initiatives, retirement planning, and engagement strategies for all employees. I also oversee the Education/Training department of the credit union which trains each Member Advocate we recruit and hire, onboarding for all employees, continuing education initiatives, management of our online learning

management system, in-house video production and writing credit-union specific curriculum.

In my free time, I enjoy... Traveling with my husband and spending time with my two step-daughters. I also love to spend time with my Jackabee (Jack Russel part Beagle), Piggy.

Silvia Dimma, CHRO

Michigan State University Federal Credit Union (\$3.8B, MI)



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 11 years.

What is your primary role & responsibilities? I am the CHRO. I am responsible for HR, Learning and Talent Development and Internal Communications.

In my free time, I enjoy... Hanging out with family and friends as well as trying to train our new lab puppy:-) We also spend our time four wheeling on trails.

Jessica Ridsdale, VP, Human Resources

Northern Federal Credit Union (\$239M, NY)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with Northern for 15+ years.

What is your primary role & responsibilities? I am the VP of HR, Training, and Compliance. My primary responsibilities include strategic leadership of these three core areas within the organization.

In my free time, I enjoy... Time with my family, boating, and reading.

Lucille Valley, CAO

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)? Lucille M. Valley, Director of Human Resources of Northwest Community Credit Union (NWCU), is an accomplished HR professional with over 25 years of work experience in both public and private sectors.

What is your primary role & responsibilities? Currently, she is responsible for developing and implementing human resources management strategies that enable NWCU to recruit, train, and retain a high performing and motivated workforce. Lucille specializes in strategic planning, talent management,

workforce planning, compensation, employee benefits, learning and development.

In my free time, I enjoy...

Jennifer Adams, HR 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've been with Northwest Community Credit Union since May 2018.

What is your primary role & responsibilities? I serve as a member of NWCU's leadership team with responsibility for establishing organization development programs that align with our core values and strategy. I also develop and execute organizational effectiveness, talent, and culture management programs aimed at advancing the credit union and enhancing

business results.

In my free time, I enjoy... Working on vintage sewing machines I've rescued from basements. I also enjoy traveling to national parks and spending a couple of weeks a year hiking and exploring new territory in the parks.

Carrie Chaffee, VP, Human Resources

Oregon State 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 for almost 6 years

What is your primary role & responsibilities? I'm the VP of Human Resources and my primary role is overall HR strategy to support our objectives and culture. My focus in the coming year will be compensation and benefits, leadership development and succession planning.

In my free time, I enjoy... Working in the yard, home improvement projects and spending time with my boys who live in Portland.

Julie Vitorelo, VP, Talent

Patelco Credit Union (\$6B, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? April 2013; I actually started on April Fool's Day and my current boss, Susan Makris, Chief Administrative Officer started exactly 1 year later – so we have the same anniversary. I like to remind her that can never forget!

What is your primary role & responsibilities? Vice President of Talent

- i. Short Elevator Pitch: The team and I are responsible for ensuring our business leaders have the right people, at the right time, in the right role, with the right skills to enable organizational performance and achieve business outcomes.
- ii. Long Elevator Pitch: I'm responsible for the employee facing part of HR/Employee Lifecycle: Talent Acquisition, Onboarding/New Hire Orientation, HR Business Partners, Recognition & Rewards/Compensation, Performance Management, Manager Effectiveness, Leadership Development, Succession Planning, Culture/Engagement, Employee Relations, etc.

In my free time, I enjoy... Doing anything outdoors: SUP, running, hiking, cycling, kayaking, etc.

Laura Wood, VP, Human Resources and Organizational Development

Spokane Teachers Credit Union (\$2.7B, WA)



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

What is your primary role & responsibilities? VP of HR and Organizational Development – oversee a team of 8 in HR and 9 in talent and leader development. Primary responsibilities include development of organizational development strategy to include performance management and ongoing focus on our total compensation philosophy; workforce planning and analytics; coaching and leadership development.

In my free time, I enjoy... Golfing whenever I can!

Nicole Colgan, AVP, HR and Employee Development

TwinStar Credit Union (\$1.2B, WA)



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

What is your primary role & responsibilities? Oversee Human Resources and Employee Development.

In my free time, I enjoy... Spending time with my two children Jack (11) and Kaya (10), hiking, reading, volunteering with Homeless Backpacks

Denise Hagen, VP, People and Culture Services

Washington State Employees Credit Union (\$2.7B, WA)



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...

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.

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 of 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.

Rebecca Wessler, AVP/Editor-In-Chief

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How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with Callahan for 9 years next week (Nov. 1). I've got a master's degree in journalism and have worked for a variety of publications in my career, including trade pubs, business journals, niche magazines, and city papers.

What is your primary role & responsibilities? I am the editor for Callahan's media products. I follow industry trends and listen to what's buzzing. I'm always on the hunt for stories of exemplary credit unions with exemplary strategies, which Callahan shares via CreditUnions.com, Credit Union Strategy & Performance, Callahan's Credit Union Directory, Supplier Market Share Guides, and more. I'm also the resident librarian for "things we've written about."

If you're not registered for the CreditUnions.com newsletter, you're missing out. Join us!

In my free time, I enjoy... I have 3 children ages 7, 5, and 4. I have no free time! I do enjoy reading and have several television programs I'd like to catch up on. Before I had kids, I loved a good flea market flip.