



## Callahan & Associates Retail Roundtable Attendee Information

July 30-31, 2018

### **Andy Shaw, COO**

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Andrew joined Blue FCU in September of 2010. He has started his career in the credit union industry in 1996 at Great Lakes Credit Union. Since then he has been involved in Member Services, Lending, Operations and Information Technology.

**What is your primary role & responsibilities?** With that last 15 years focused on Information Technology. Andy holds a B.S. in Information Systems Management. Major projects include core conversion, CU merger, Multiple Online/Mobile banking conversion. Recently transitioned into role as the Chief Operations Officer. Current areas of responsibility include: Member Services (Branches and Contact Center), Marketing (Business Development, Community Relations and Marketing), E-Services (Cards, ATMs, Electronic Delivery services)

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

### **Azul Sanchez, AVP Regional Manager**

*Orange County's Credit Union (\$1.5B, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with Orange County's Credit Union for 11 years.

**What is your primary role & responsibilities?** As an AVP Regional Branch Manager, I am responsible for the achievement of multiple branch service and growth objectives. I foster a strong service culture as well as an empowered work environment that allows associates to provide service excellence to members, associates and businesses while demonstrating the core values of Orange County's Credit Union. In my role, I must maintain current knowledge of trends in the financial service market place, consumer attitudes and behavior toward financial services, and the customer service industry in general. I utilize the voice of the Member to monitor and improve processes, Member experience and Net Promoter Score.

**In my free time, I enjoy...** Spending time with my family, friends and two puppies. I love hiking, traveling, and reading a good book.

**Chase Clelland, VP, Operations**

*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)?** I joined Grow Financial FCU in January of 2013.

**What is your primary role & responsibilities?** I am officially the VP of Operations running all our retail operations teams including 26 stores, 200 front line team members, 23 managers, 3 AVPs, 2 Ops Support team members and 2 SEG reps. Our retail foot print is spread between FL and SC. As of this conference a colleague and myself have switched roles as an executive rotation for one year. This new role will be VP of ERM handling our Fraud, BSA and InfoSec teams.

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

**Daniel Parsons, VP, Branch Operations**

*BCU (\$2.9B, IL)*

## Denise Pope, VP, Branch Administration

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)?** I have been with Tower Federal since January 2018.

**What is your primary role & responsibilities?** I am the VP of Branch Administration. I have responsibility for all activities that occur in our branches. Service, Sales and Operations. I work closely with other VPs at Tower to ensure we provide outstanding member experiences.

**In my free time, I enjoy...** spending time with my one-year old granddaughter. I love to travel, and I enjoy walking outdoors.

## Doreen Bjorkman, Branch Services & Operations

USAlliance Financial Credit Union (\$1.3B, NY)



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Since April 2016, approximately 2 years 3 months. Previous experience was with Corporate Banking for 29 years.

**What is your primary role & responsibilities?** Oversee Branch distribution which includes Sales, Operations and Member Services.

- 18 Branches in 4 states
- In addition to day to day operations, responsible for creation and implementation of operational policy and procedures
- Responsible for Acquisition and Deepening Strategy and Sales Tactics

for organization

- Work closely with Executive Team to create and execute Strategic Plan of the organization
- Facilities Management for all Branch locations including expansion, branch design and closing decision

**In my free time, I enjoy...** Spending time with family and friends especially at our Beach Home in Maine. Enjoy the waves as much as sunning and reading mysteries and biographies

**Elizabeth Miller, SVP, Member Experience**

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Since November of 2014.

**What is your primary role & responsibilities?** I am the SVP of Member Engagement and Service which includes the Retail Branch Network (23 branches in NY, NJ and CT), the 65 person Contact Center, the Investment Services Group, our Sales Leadership Team (Business Banking, Member Development Team, SEG Acquisition and Sales Training), and our Central Support Team (support for the front line).

**In my free time, I enjoy...** Travel, reading, tennis, walking and shopping.

**John Rivera, SVP/Chief Retail Officer**

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



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

**What is your primary role & responsibilities?** As Chief Retail officer (CRO) if it touches the member or is sales related I'm involved. Primary responsibilities: Retail production branch & Online, branch profitability, branch growth strategy, branch operations, mortgage originations, member experience – secondary digital and marketing, Bellco foundation, community involvement.

**In my free time, I enjoy...** Hiking 14'ers, off roading and exploring

Colorado/Travel.

## **Kent Paro, VP, Enterprise Risk Management**

*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)?** I've been with Grow Financial for 1 year after 31 years in the Navy

**What is your primary role & responsibilities?** VP, Enterprise Risk Management – responsible to oversee the development and implementation of Risk strategy, governance, management, and quantification. Leads the Fraud, BSA/AML, Physical Security, Business Continuity/Disaster Recovery, and Cyber-Security departments.

**In my free time, I enjoy...** Skydiving, golf, running, reading, and travel.

## **Marc Prasch, VP, Retail Operations**

*Fort Knox Federal Credit Union (\$1.4B, KY)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 1.5 Years.

**What is your primary role & responsibilities?** I currently serve on our Executive Management Team and lead our 17 Branches, Call Center, Retail Operations, Community Sponsorships & Donations, Business Development, and Brokerage Services.

**In my free time, I enjoy...** Spending ANY time I can with my bride and my daughter. I love sports, soccer specifically, playing golf, traveling, and trying something new.

## **Mathew Gaspari, COO**

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I've been with Tucson Federal Credit Union for just over 26 years now.

**What is your primary role & responsibilities?** Chief Operating Officer. My areas of responsibility are Operations, Wealth Management and Marketing. My overarching role is to provide the vision for each of these areas and then the guidance and development opportunities so that the teams can achieve their objectives. A lot of time is spent in project management and strategy development.

**In my free time, I enjoy...** Time with my wife and two daughters is primary. Fitness activities, gym, cycling, running (if I have to) help me keep up with all of them.

## **Michael Twomey, SVP, Retail Banking**

*Logix Federal Credit Union (\$5.3B, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 19 years, I joined what was then Lockheed Federal Credit Union in 1999 as Manager – Business Development. Over the past 19 years I worked in SEG Acquisition, Business Development, and then Retail Banking. I have over 40 years of experience in both retail and commercial banking, as well as development of member experience climates, and sales coaching.

**What is your primary role & responsibilities?** In my role as Senior Vice President Retail Banking & Loan Centers my primary role is to oversee our 15-branch network in the northern Los Angeles County market area, as well as our Phone & WEB Loan Centers. My division is responsible for the execution of our Member Experience with each member my staff interacts with. The Retail Branches combined with the Loan Centers are the primary loan production channels for Logix, in addition to deposit acquisition, checking cross-sales, and consumer loan insurance. In addition, the Retail Banking Division is responsible for maintaining our high Net Promoter Scores with each member we interact with.

**In my free time, I enjoy...** Spending time with my wife Carolyn and our 4 adult children and 5 grandchildren. In addition, I am an avid fly fisherman and enjoy wilderness camping along some of the remote stream in the eastern Sierra Nevada mountains.

**Michelle Kloack, Member Experience Market Manager**

*Lake Trust Credit Union (\$1.8B, MI)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 10.5 years.

**What is your primary role & responsibilities?** I'm a Member Experience Market Manager so I work with our branches and coach and develop our branch leaders. I also work on future strategy of the branches and our Onstage Team, implementation of universal agent throughout the branch network and our Contact Center, project teams, collaboration with out departments throughout the credit union.

**In my free time, I enjoy...** Spending time with my family, traveling, running, reading, exploring new places.

**Mike Tambourine, Director of Sales and Service**

*Resource One Credit Union (\$476M, TX)*



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

**What is your primary role & responsibilities?** I am over branch operations, sales and service.

**In my free time, I enjoy...** I enjoy doing yardwork and gardening in my spare time as well as playing guitar.

## Nicole Whitely, Member Experience Market Manager

Lake Trust Credit Union (\$1.8B, MI)

## Tara Springsteen, VP, Operations

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



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

**What is your primary role & responsibilities?** I oversee all aspects of the day-to-day member facing operations, including the member experience, products and services, and compliance.

**In my free time, I enjoy...** being a mom to my 2 amazing kids, Axel (5) and Piper (3), they are currently my main free time activity. I do also enjoy running, outdoor activities, and watching my husband play music when I can.

## Will Crosswell, VP, Service and Sales

Ardent Credit Union (\$645M, PA)



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 3 Years.

**What is your primary role & responsibilities?** • enhance the member experience by bringing value to each interaction.

- creating a sales and service environment that encourages staff to promote quality products in an effort to make a positive impact in the lives and financial well-being of our members and potential members.

- develop and implement strategic plans to retain and grow membership in targeted markets that are aligned with the Credit Union's overall strategic direction.

**In my free time, I enjoy...** Running! I also enjoy home brewing beer, TV/movies, college football, and (of course) spending time with my wife and daughter.



## **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 my free time unpacking boxes, looking at furniture online, mowing my new yard (.33 acres!), and learning to be a good homeowner.