



AACUC 2024 Kenya Learning Experience

Attendee Bios

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Bill Cheney
CEO
SchoolsFirst FCU

Bill Cheney is the Chief Executive Officer of SchoolsFirst Federal Credit Union. A small group of educators from Santa Ana College and Santa Ana High School founded the federally chartered, not-for-profit financial cooperative in Santa Ana, California in 1934. Today, the credit union has expanded to serve school employees and their families throughout California and is the largest credit union in the state and the fourth largest in the nation, with more than 1.4 million Members and over \$30 billion in assets. SchoolsFirst FCU has been recognized by Consumer Reports as the number one credit union in the nation for Customer (Member) Service.

Guest: **Crissy Cheney**



Brett Martinez
President/CEO
Redwood CU

Brett Martinez is President & Chief Executive Officer of Redwood Credit Union (RCU), the North San Francisco Bay area's largest credit union. RCU serves over 459,000 Members with \$8.51 billion in assets and has been voted Best Place to Work by employees for 18 consecutive years. Brett oversees all aspects of the Credit Union, including its CUSO, which includes an auto dealership and an insurance agency. Brett has more than 37 years of credit union experience. He has served as a senior executive for both the California Credit Union League and a large Southern California credit union prior to joining RCU in 2002.

Guest: **Theresa Martinez**



Cathie Mahon
President/CEO
Inclusiv

Cathie Mahon is the President\CEO of Inclusiv, a national network of credit unions devoted to promoting financial inclusion and equity by expanding access to capital in low-income and communities of color. Under her leadership, the Inclusiv Network has grown to 500 community development credit unions that build wealth, resilience and empowerment in communities across 46 states, Washington DC, Puerto Rico, the US Virgin Islands and Guam. Ms. Mahon previously led the NYC Office of Financial Empowerment, the first municipal office in the nation dedicated to promoting the financial health and well-being of city residents.

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Debbie Smith
President/CEO
Georgia United CU

Debbie Smith joined Georgia United in 2002, serving in several roles before being appointed Georgia United's first female CEO in 2013. Under her leadership, Georgia United has grown from \$950M to over \$2B in assets and the Georgia United Foundation was established. Georgia United has been recognized locally and globally for their products and services as well as their commitment to social responsibility and community service. One of these honors includes the International Communitas Award reflecting "people helping people" in service, which Georgia United received for two consecutive years.



Diana Houston
Co-Founder/CSO
COOPR8 Consulting

Diana Houston began her career as a part-time employee at US Central Credit Union in Overland Park Kansas while attending the University of Kansas. At US Central, Diana became active in supporting the work of the Corporate Forum, an association of leaders from the young network of wholesale support credit unions in the U.S. In 1983, Diana went to work for Georgia Central Credit Union, one of the member organizations of the Corporate Forum. She was actively involved in the consolidation of operations with the Georgia Credit Union League under an innovative structure that became known as Georgia Credit Union Affiliates. In the decades that followed, Diana assumed lead roles in the development of innovative new services and the formation of new user-owned structures in support of the Georgia credit unions.



Donna Burnham
United Way of Greater Atlanta

Donna Burnham is a visionary leader and the driving force behind United Way of Greater Atlanta's 211 services. Since joining UWGA in 1995, she has played a pivotal role in establishing and evolving the 211 service launched in 1997.

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Edwin Bell
Director
Georgia United CU

Edwin T. Bell is an accomplished non-profit executive with a distinguished career spanning over 25 years. He serves on the Board of Directors for Georgia United Credit Union (U.S.A.) and, is the Director of Racial Justice, Equity, and Inclusion for the National Center for State Courts. Edwin holds both Bachelor of Science and MBA degrees, is a Fellow of the Institute for Court Management and holds the Public Leadership Credential from the Kennedy School of Government at Harvard University. Edwin's journey is defined by his visionary leadership. He possesses a rare ability to drive change, build impactful partnerships, and spearhead transformative initiatives. His unwavering commitment to justice continues to leave an indelible mark on the organizations in which he works and within the community in which he lives.



Emma Hayes
Chief Learning &
Engagement Officer
State Employees CU

Emma Hayes is the chief learning and engagement officer for the Raleigh, North Carolina-based State Employees' Credit Union (SECU). In her current role, she oversees equity, diversity, and inclusion (EDI) learning and organizational development, and employee engagement. She has over 25 years of experience serving in various roles. Her focus on relationship-building and service is what sets her apart. Her experience includes her role as the Chief Diversity Officer (CDO) for the African American Credit Union Coalition (AACUC). There she provides guidance and support to credit unions, business partners and affiliate organizations.



Eric Jenkins
President/CEO
SRP FCU

Eric Jenkins was named as the Chief Executive Officer of SRP FCU on Sep 2022. Prior to joining SRP, he was the CEO of Education in Amarillo, TX from Jun 2019 – Aug 2022. Under his leadership, Education CU experienced significant growth and financial success. Eric joined Georgia United CU in Jan 2014 and currently serves as the Chief Deposit Services Officer. Before joining Georgia United, Eric was the Chief Operating Officer of CU Partner Link, where he was given the opportunity to direct the launch of an innovative collaboration between the credit union leagues of California, Georgia, Iowa, Ohio & Texas. Prior to this, he was the Senior Vice President of Credit Union Growth Services at Georgia Credit Union Affiliates (GCUA) for four years.

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Esperanza 'Espy' Poblano
Training Manager
AACUC

Esperanza Poblano is a training manager with over 10 years of experience in the financial industry. She is passionate about continued education, people development and is committed to supporting diversity, equity, inclusion and belonging initiatives industry wide. Throughout her career, she has demonstrated effective leadership skills and communication skills while working with a remote team. Currently, Esperanza Poblano works at the African American Credit Union Coalition, where she is responsible for training consultations, training development, member communication and social media content creation.



Fonta Gilliam
Founder/CEO
Wellthi Technologies

Fonta Gilliam is the Founder and CEO of Wellthi Technologies, a fintech company in Washington, DC. Wellthi's software empowers financial institutions to integrate social finance, helping users achieve financial goals with their communities. With over a decade of experience, Ms. Gilliam has served as a U.S. Diplomat and a consultant at Deloitte, leading initiatives that support women entrepreneurs. She holds a Master's in economic development from American University and a Bachelor's in political science and economics from Howard University. Wellthi has earned recognition in Forbes and on the 2023 DC Tech Titans List.



Heiwote Tadesse
Executive Vice President
Associated Credit Union

Heiwote Tadesse, with 24 years of experience in the credit union industry, demonstrates the "People Helping People" philosophy with intentionality and grace. Ms. Tadesse knows firsthand how critical it is to create extraordinary moments for members and employees. She leads by example to ensure both have positive, memorable encounters with Associated Credit Union. In 2000, when Ms. Tadesse was hired as a Teller, her ability to cultivate sustainable change quickly surfaced, and her leadership journey with ACU began. Today, as Executive Vice President of Member Relations, Ms. Tadesse oversees the Operation areas of the credit union., developing platforms, strategies, and goals to help them achieve their greatest potential.

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Janice Robinson
President/CEO
BoardReady

Janice Robinson is President & CEO of BoardReady LLC, a national nonprofit governance training program designed to connect individuals to nonprofits who are seeking board members. BoardReady's primary business model is focused on supply and demand, ensuring boards and potential board members have opportunities for mutually beneficial civic engagement. In her role, Janice works closely with nonprofit organizations, city officials and community and civic leaders to assist with building organizational capacity.

Guest: **Donna Burnham**



Joan Nelson
Chairperson
Coastal Credit Union

Joan Nelson recently retired from IBM after more than 41 years of service. When she retired, she served as Vice President, Enterprise Operations & Services (EO&S) Acquisitions and Divestitures. In that role she led a team of project managers responsible for ensuring the successful transition of the quote-to-cash processes of acquired or divested companies, leveraging effective collaboration to ensure seamless transitions. Her immediate past role was Vice President, Quote-to-Cash Operations supporting the Americas. In this role, Joan led a global team of 1300+ employees providing quote-to-cash enterprise services to IBM Sellers, Business Partners and IBM Business Units. Their goal was to leverage new ways of working, such as cognitive and data analytics, to provide exceptional Stakeholder and Client experiences. Joan has held several leadership and executive roles during her tenure at IBM supporting Hardware, Software and Services.



Jonathan Roberts
President/CEO
Hudson Valley FCU

Jonathan W. Roberts, President & CEO Jonathan W. Roberts joined Hudson Valley Credit Union (HVCU) as President/CEO in September of 2022. HVCU is one of the larger United States credit unions with assets totaling over \$7.3 billion as of July 2024. The credit union currently employs over 1,000 people and has 22 branches. Prior to joining HVCU, Jonathan served as Executive Vice President at Webster Bank in Connecticut, where he led Community Banking and served on the bank's Operating Committee. Jonathan has extensive banking experience over the past 28 years with a number of well-respected institutions, including Fifth Third Bank, Citizens Bank, FNB Corp and Santander North America.

Guest: **Angela Roberts**

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Kat Bing
Software Development
Operations Administrator
Origence

Kat Bing serves as the Software Development Operations Administrator at Origence. In this role, I ensure the seamless operation of the software development department, managing onboarding, cross-functional projects, process improvements, and issue resolution. My work supports leadership in addressing operational challenges while driving continuous improvement. With a strong foundation in agile methodologies, I lead key projects, collaborate on recruitment strategies, and help organize significant events such as Program Increment Planning. My focus is on optimizing processes and enhancing team collaboration to ensure sustained success for our development initiatives.



Kevin J. Martin
EVP Strategic Integration &
Member Experience
SchoolsFirst FCU

Kevin Martin leads the Strategic Integration & Member Experience department at SchoolsFirst FCU. His responsibilities include identifying ways to continue and advance world-class personal service delivery, strategic planning and implementation functions, anticipating concerns and leading the change needed to ensure enduring financial strength. Kevin has become a Credit Union Development Educator, CUES CEO Institute graduate, and a Certified Diversity Professional. Kevin sits on the board of the CURQL Collective (the first credit union-led ecosystem) and was the founding president of the AACUC West Coast Chapter. In 2022, he was selected as one of the “100 Most Influential African American Leaders in Business” and received the CUES Exceptional Leader Award.



Liz Ponder
EVP Chief Retail Officer
SRP FCU

Liz Ponder is a Senior Executive leader for SRP Federal Credit Union, a \$1.7 Billion organization headquartered in North Augusta, South Carolina. SRP FCU has over twenty branches with almost 400 employees. As an Executive Vice President and Chief Retail Officer for SRP, she gives great focus to the service of the member, and to the well-being and development of her employees, while placing emphasis on positively impacting her community by creating opportunities for people to grow and thrive. Liz began her career as a teller for First City Bank in Fort Walton Beach Florida. Her twenty-year financial resume speaks to many leadership positions which include Wells Fargo and Regions Bank. Her Credit Union journey began as Vice President of Redstone Federal Credit union, a \$5 Billion organization in Huntsville, Alabama.

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Marvin York
VP Member Experience
Velera

Marvin York leads PSCU's Contact Center Member Experience team, including the Quality assurance group, Gen AI Speech Analytic unit and is responsible for developing, directing and implementing strategic initiatives and business solutions for the organization's contact centers. At every level of engagement, Marvin's career spans more than 30 plus years of extensive experience in the financial call center industry, including leadership roles at Chase and Citibank. Marvin is an International Speaker for Diversity, Equity, and Inclusion, serving as the Sponsor for PSCU's (Sankofa) African American Business Resource Group. In this role, he has helped to build an inclusive network of professionals and led educational events and seminars geared toward fostering successful growth and development opportunities.



Michael Dove
VP Enterprise Process
Excellence & Quality
Velera

Michael Dove is a member of the Velera's Organizational Effectiveness unit within its Culture organization and leads the Operational Efficiency Center. This team consists of Lean Six Sigma Master Black Belts & Black Belt Process Engineers, our Business Transformation Program Managers, Operational Business Intelligence & Analytics, as well as the Center of Intelligent Automation (RPA Center of Excellence). Michael has been at Velera since 2013, working 23 years with Bank of America prior to that. He is a Certified Six Sigma Master Black Belt, Certified Scrum Master, certified ADKAR Change Manager & International Coaching Federation Associate Certified Coach. He is also very active in Velera's Diversity Equity and Inclusion initiative. He is the co-sponsor for Sankofa, the African American business resource group, which provides mentoring and access to persons of color within the organization.

Guest: **Brandie Banks**



Mike Mercer
Founder/CEO
COOPR8 Consulting

Mike Mercer has dedicated his career to advancing the capabilities of American credit unions in fulfillment of their mission to improve the financial well-being of people. He has become a champion for the cooperative business model, regarding it as the best foundation for delivering value fairly to the members. Mike's credit union career began in 1977 as a part-time employee at ICU Services Corp, the business subsidiary of the Credit Union National Association. In 1983, Mike was instrumental in combining the meager resources of Georgia Central and the Georgia League into an innovative structure that became known as Georgia Credit Union Affiliates. He retired from League work at the end of 2019. In 2020, Mike formed COOPR8 Consulting and engaged in the work of bringing co-ops from other sectors together with credit unions in cross-sector collaborations.

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Murray Williams
President/CEO

Iowa Credit Union League

Murray Williams serves as the President & CEO of the Iowa Credit Union League (ICUL). He also serves as board chairman and CEO of Affiliates Management Company (AMC). In these roles, Murray provides strategic leadership and governance oversight for AMC's family of companies, board and executive teams. Murray has been with AMC/ICUL since 1996. Murray serves on the SHAZAM board and has served on the CUNA Strategic Services board along with other industry leadership roles. He has been inducted into the International Executive Volunteer Corps for the World Council of Credit Unions and is a recipient of the Leadership and Support Award by the Network of Latino Credit Unions and Professionals.

Guest: **Amy Williams**



Priscilla Awkard

VP Branches, Digital Sales &
Member Assistance
Coastal Credit Union

Priscilla Awkard has been in the financial industry for over 28 years. Since graduating from Elon University in 1991, she has held a diverse background of positions. Starting her career as a Certified Retirement Specialist gave her a solid foundation and launched her into the world of big banks. Working for several bank giants helped her realize the people and the purpose are what really matter. Gaining experience along the way in different positions such as branch manager, workplace banking specialist, cross border banking manager and regional marketing advisor before entering the world of credit unions. For the last 13 years, Priscilla has fully embraced the credit union movement while working for Coastal Credit Union (Raleigh, NC). She currently sits as the VP of Branch (18 branches), Digital Sales, and Member Assistance. Between the three teams she manages over 130 employees.



Renée Sattiewhite
President/CEO

AACUC

Renée Sattiewhite is the President/CEO of the African-American Credit Union Coalition (AACUC). Renée brought both her unique vitality and a forward-looking vision in order to create one of the most dynamic organizations in the credit union movement. Her high energy, high expectations and high touch approach for leading the organization has created a momentum for growth and change and directs a strong commitment towards eradicating racism. Today, AACUC is the leading voice on Diversity, Equity and Inclusion in the Credit Union Movement thanks to Renée. She has successfully propelled the organization forward to offer a credible voice that addressed today's dialogue on race, equity, and inclusion for all.

Renée is a certified diversity professional, a credit union development educator, motivational speaker, executive coach, mentoring trainer, and is a recognized expert on marketing and branding. She serves as a Board Member of the World Council of Credit Unions Foundation and a Master Trainer for the United Way of Atlanta's VIP Board Development Program.

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Sandra DeVoe Bland
Board Chair
SRP FCU

Sandra DeVoe Bland currently serves as chairman for SRP FCU Board of Directors. Ms. DeVoe Bland is one of AACUC's 2024 Pete Crear Lifetime Achievement Award recipients and 2019 Hall of Fame honorees. She has contributed to and ensured the financial safety and soundness of SRP FCU. She has volunteered in the credit union movement for over 27 years as a board member, mastering governance, and consultative leadership utilizing strategic thought to execute her duties. As a strong supporter and champion for AACUC, she reinforces SRP FCU commitment from 3 founding AACUC members. She is committed to "people helping people," actively involved in teaching financial education, champion for the credit union movement, and advocate for members' interest.



Sheila Montgomery
Credit Union Leader
AACUC Founder

Sheilah Montgomery's dedication and accomplishments in the credit union industry for over 49 years reflects her deep commitment to financial wellness and community development. A Certified Chief Executive (CCE), Credit Union Development Educator (CUDE), and International CUDE (I-CUDE) from South Africa, Sheilah is passionate about creating opportunities for credit unions by enhancing their financial capacity to serve individuals, families, and communities. Throughout her distinguished career, Sheilah has led three Certified Community Development Credit Unions, securing millions of dollars in grants to support programs that help 1st time homeowners and under-resourced communities. She has also provided strategic guidance to sustain small asset-sized credit unions, ensuring their continued viability and growth. A co-founder of the African American Credit Union Coalition (AACUC), Sheilah holds the distinction of being the longest-serving board member of the organization. Her contributions have been recognized with numerous accolades, including the Pete Crear Lifetime Achievement Award, induction into the AACUC Hall of Fame, and the Annie Vamper Award from Inclusiv.



Tammy Schultz
SVP B2B Sales
TruStage™

Tammy Schultz is the Senior Vice President, B2B Sales for TruStage™. In this role she is responsible for strategic and profitable growth, developing and strengthening partner relationships, and executing on priorities to drive success at TruStage. Schultz joined TruStage™ as President of Preplanning Solutions through the acquisition of that business from Assurant in 2021 and in 2023 grew her responsibility to include the B2B Sales Division. Ms. Schultz joined Assurant in October 1995 in a sales and marketing role, and through several influential positions established herself as a strong leader with roles spanning communications and advertising, corporate and field training, partner relationship development, and organizational readiness and change management. In 2003, Ms. Schultz was promoted to Vice President, Corporate Development, where her focus was on the future strategy of the preneed business. In that capacity, she helped grow the business to over \$1 billion in annual sales across North America.