

NCBA CLUSA COOPERATIVE EXECUTIVE ROUNDTABLE

May 9-10, 2023

Executive Bios

NCBA CLUSA

COOPERATIVE EXECUTIVE ROUNDTABLE

COOPERATIVE EXECUTIVES

Executive Bios

Thank you for registering

The following executive bios are
listed alphabetically.

Larry Blanchard

CUNA



Larry Blanchard serves as Public Affairs Consultant for CUNA Mutual Group. He is also CUNA Mutual Group's representative on the Cooperative Development Foundation where he serves on its board of directors and finance committee. In 2012 he received CFA's Esther Peterson Consumer Service Award. Among other recognitions, he was inducted into the Hall of Fame by the National Cooperative Business Association, received the National Credit Union Foundation's Herb Wegner Lifetime Achievement Award, CUNA Mutual Group's Leadership Award, and Credit Union Development Educators Award for Outstanding Service.

In 1992, Mr. Blanchard volunteered with President-elect Clinton's transition team and continued to serve in the White House communications office during the early phase of the administration's launch. He joined CUNA Mutual Group in Madison, WI to lead the company's public relations and communications department. In 1996 CUNA Mutual Group "loaned" Blanchard to head the critically successful Credit Union Campaign for Consumer Choice.

Upon returning to Madison in 1998 he established and led CUNA Mutual Group's Corporate and Legislative Affairs office. He served as chairman of the credit union system-wide Unrelated Business Income Tax Steering Committee, and chaired the cooperative movement's task force on co-op capital.

Howard Brodsky

CCA Global Partners



Howard Brodsky is Co-Founder and Chairman of CCA Global Partners, one of the largest privately held companies in the United States; and the second largest private company in the state of New Hampshire. CCA is comprised of 14 cooperatives, serving over a million family businesses and 22,000 childcare centers in 4 countries, with aggregated revenue of over 10 billion. Brodsky is a world thought leader on the cooperative shared ownership business model.

Brodsky was inducted into the Cooperative Hall of Fame, that recognizes individuals who make unparalleled contributions in advancement of the principles of cooperation in the United States. One of Brodsky's other notable accomplishments was being inducted into the Entrepreneur Hall of Fame along with such notable people as Michael Dell and Starbucks' Howard Schultz.

In 2020, he was named the Business leader of the Decade. In 2019, he received the Global Leadership Award from the World Affairs Council. Brodsky serves on many boards including Southern New Hampshire University, SoutionHealth, NCBA, Big Brother Big Sister and NHPBS and is Chairman of the Better Business Bureau. He also founded and is Chairman of Cooperatives For a Better World, a nonprofit operating in 14 countries. Most recently, Brodsky received an Honorary Degree of Humane Letters from the University of New Hampshire in 2021.

Sam Brownell

Stratus Wealth Advisors



Sam Brownell, CVA, CFA, MBA has been a financial professional since 2006 and formed Stratus Capital Management in July 2013 to provide goals-based financial planning and investment management to individuals, families, and independent business owners. As the firm grew, an increasing number of independent business owners sought Sam's advice on their short and long-term planning needs, including valuation, tax strategy, business continuity planning, and succession planning. In 2019, Sam obtained the CVA certification from the National Association of Certified Valuators and Analysts (NACVA) in order to better serve the valuation and succession planning needs of his independent business owner clients.

Sam earned his BA in Economics from Loyola University in Maryland and his MBA from the University of Maryland's Robert H. Smith School of Business. Prior to forming Stratus, Sam worked in trading, valuation, and research at two investment banks, where he became a CFA Charterholder, and was an economic consultant analyzing structured financial products and other fixed income securities.

In his free time, Sam gives back to his community as treasurer of a local, DC-area non-profit focused on teaching children to swim, and he is also an avid fly fisherman. Sam and his wife, Sara, reside in Kensington, MD, with their sons Felix and Finn.

Ellis Carr

Capital Impact Partners (CIP)



Ellis Carr has more than 20 years of experience in the financial services and mortgage industries. Carr has served as Capital Impact Partners' President and Chief Executive Officer since 2016. As of April 2021, he also became the President and Chief Executive Officer of CDC Small Business Finance.

Carr originally joined Capital Impact in 2012 as the Chief Financial Officer and Treasurer. Prior to joining Capital Impact, he held various positions in the investments, capital markets, strategy, and corporate finance areas within Freddie Mac, and in fixed-income fund management both domestically and abroad at Deutsche Bank.

Carr is an Aspen Institute Finance Leader Fellow, is a board member of the Marguerite Casey Foundation, and serves as the board treasurer for HPN (the Housing Partnership Network). He has been recognized as one of Fast Company's "Most Creative People in Business," and selected by the Washington Business Journal as its "Nonprofit Leader of the Year" as well as being named to its "Top Minority Business Leaders" and "Top 40 Under 40" business executives lists.

Carr graduated from Towson University with a bachelor's degree in Accounting, and from Georgetown University with a master's degree in Real Estate with a concentration in Finance.

Brian Cavey

CoBank



As senior vice president of government affairs, Brian Cavey represents CoBank before Congress, the administration and regulatory agencies and is based in Washington, D.C.

Prior to joining CoBank, Mr. Cavey served as the vice president of legislative affairs for the National Rural Electric Cooperative Association (NRECA). Before joining NRECA in 2009, Mr. Cavey worked as a lobbyist with the Stanton Park Group representing a diverse group of clients. Mr. Cavey is an accomplished legislative operative with over 20 years of experience on Capitol Hill, in the state capitols, in corporate government affairs and trade association management.

Before going into politics, Mr. Cavey was an educator, serving as an assistant to the dean of the Montana State University College of Agriculture, where he was liaison between students and university academic committees.

Mr. Cavey holds bachelors and master's degrees in agriculture education from Montana State University.

Bill Cheney

SchoolsFirst Federal Credit Union



Bill Cheney is the president and CEO of SchoolsFirst Federal Credit Union, the largest credit union in California and the fifth largest in the nation, with almost 1.2 million members and \$26 billion in assets.

Bill has worked in the credit union movement for more than 34 years. He joined SchoolsFirst FCU in 2014 as CEO after working in credit unions in Texas and California as well as serving as the CEO of credit union trade associations at the state and national level. He is a recognized leader in the cooperative movement and serves on the boards of the Consumer Federation of America, Worldwide Credit Union Foundation, the Filene Research Institute and the Western CUNA Management School Board of Trustees. In addition to his work with cooperatives, Bill serves on the Board of Trustees of Children's Miracle Network Hospitals, the Cal State Fullerton Philanthropic Foundation Board of Governors and the UCI Chief Executive Roundtable.

Bill is a graduate of The University of Texas at Austin, completed the CUES Directors' Leadership Institute at the London Business School and the Advanced Leadership Institute at Harvard Business School.

Bill and his wife, Crissy, live in Orange County, California. They have two adult children and three young grandchildren.

Patrick Connealy

National Cooperative Bank (NCB)



Patrick N. Connealy is the Executive Vice President at National Cooperative Bank (NCB).

Prior to his current role, he was the Managing Director and the head of the Corporate Banking Group of NCB. Prior to joining NCB in 1986, he worked as a supervisory officer with the Farm Credit Administration in Washington, DC, and as assistant vice president and loan officer for the Farm Credit Bank of Omaha.

Mr. Connealy attended the University of Nebraska - Lincoln and received his Bachelor's Degree in Finance and Economics.

Carla Decker

SkyPoint FCU



Carla Decker has deep-rooted experience in mission-driven credit union roles and serves as the CEO for SkyPoint FCU. She has 30-years of credit union leadership experience with past roles, including both President and Operations Manager of successful credit unions in the DC locale.

Her leadership experience, combined with her passion for community service, benefits both the internal staff and Credit Union members. She has served on multiple boards, including the National Cooperative Business Association and Inclusiv. Additionally, Decker designs and crafts curriculum for international Credit Union Development Education programs and has helped graduate over 1,200 credit union leaders from the Caribbean. In 2017, she earned the Joe Biden Educator of the Year Award from the International Credit Union Leadership Foundation, and she co-founded the National Association of Latino Credit Unions and Professionals.

Carla Decker holds a master's degree in International Commerce and Politics and a bachelor's degree in General Studies and Finance.

Robyn DesHotel

National Co+op Grocers (NCG)



Robyn DesHotel is a seasoned finance professional and CFO of National Co+op Grocers (NCG). NCG is a business services cooperative for retail cooperative grocery stores located throughout the United States.

Previously, DesHotel worked as the CFO of the American Booksellers Association (ABA) where she provided financial and operational support to the program staff. Before ABA, DesHotel worked for the PEN American Center, Inc., where she served as the director of finance and administration since 2010, and was responsible for managing and improving the financial performance of the organization, the administration of human resources functions, and the operations of the office.

DesHotel attended Rice University to study business, and later received her M.B.A. from the Stanford Graduate School of Business.

Gloria Dixon

BECU



Gloria Dixon serves as the Director of Philanthropy & Executive Director of the BECU Foundation. In this dual role, she is responsible for carrying out BECU's overall Philanthropy Financial Health Strategy and will create innovative programs that align with BECU's Purpose through community partnerships and stakeholder engagement.

As the Director of Philanthropy she develops and maintains BECU's cooperative philanthropy programs through grant making priorities, procedures, guidelines, criteria and impact evaluation metrics. Additionally, as Executive Director of the BECU Foundation, she will lead and carry out the work of the Foundation in collaboration with the Foundation Board.

Dixon attended Marquette University where she received her Certificate of Complete for Future (Leadership). Future (Leadership) Milwaukee is a community leadership program with more than 1,500 graduates. For over 35 years, participants have been making an impact on the Greater Milwaukee area through their leadership positions in government, business, education, religious and non-profit institutions.

Donna Doleman Dickerson UM Credit Union



Donna Doleman Dickerson, MBA, CDP, serves as the Chief Marketing Officer at UM Credit Union. In this role, Dickerson leads marketing, communications, financial education, community development, and innovative product design to meet the needs of its members, businesses, universities, and communities that UMCU serves.

Dickerson also built and led successful marketing teams at Ann Arbor SPARK, Pfizer, and Detroit Medical Center, as well as consulted with many tech-based startups in Michigan during her time with the Small Business Technology Development Centers.

Dickerson earned her Bachelor of Science in Health Care Administration from Florida A&M University and her Master of Business Administration from the University at Buffalo School of Management at the State University of New York. Dickerson is also a Certified Diversity Professional, CDP.

Andrew Don

CFC National Rural Utilities



Andrew Don works as Chief Executive Officer at National Rural Utilities Cooperative Finance, which is a Lending & Brokerage company with an estimated 250 employees; and founded in 1969. Prior to his current role, Don, was the senior vice president and treasurer at CFC. Don's role entailed oversight of the Treasury Group, which included all funding operations for CFC, as well as investor relations, banking relations, rating agency liaison and the loan syndication function on behalf of CFC's member borrowers.

Don joined CFC in 1999 as the director of Loan Syndications. He has an extensive background in banking and treasury operations. Prior to joining CFC, Don held the position of vice president and manager of the Washington, D.C., office for The Bank of Tokyo-Mitsubishi. He has also worked for the Bank of Montreal and The Bank of New York.

Don received a B.A. degree from Dickinson College and an M.B.A. degree from Fordham University.

Casey Fannon

National Cooperative Bank (NCB)



Casey Fannon is President & CEO of National Cooperative Bank and leads its Executive Council, a team of senior managers representing business development units and functional areas across the company.

Since joining NCB in 1996, Mr. Fannon has dedicated his entire career to National Cooperative Bank and has served as its President since March 2020. In that role, Mr. Fannon has worked in new product and market development, commercial real estate, and capital markets, and has managed NCB's loan and deposit production across all NCB's customer segments.

In addition to serving on NCB's Board, Mr. Fannon currently serves on the Board of Directors of Capital Impact Partners, a national Community Development Financial Institution (CDFI), and The National Grocers Association (NGA), a national trade association representing the retail and wholesale community grocers nationwide.

Mr. Fannon received a BS in Finance from Bentley University and is a Chartered Financial Analyst charter holder.

Erik Forman

The Drivers Cooperative



Erik Forman is co-founder of The Drivers Cooperative, the first driver-owned rideshare platform cooperative in the United States, as well as People's Choice Communications, the world's first worker-owned ISP, launched by striking cable technicians.

Before turning toward cooperative development as a strategy for system change, Erik was active in the labor movement for over 15 years, leading groundbreaking unionization campaigns in the fast food industry and conducting organizing trainings and workshops across the world.

Erik is pursuing a PhD in Cultural Anthropology at the CUNY Graduate Center. He currently teaches at the Harry Van Arsdale Jr. Center for Labor Studies in New York City, and is a visiting fellow at the Mobility Lab at the Max Planck Institute for Social Anthropology and a Research Affiliate at the Institute for the Cooperative Digital Economy at The New School.

Paul Giudice

CoMetrics



Paul is an experienced leader with a successful track record of planning and executing growth strategies. He leads the CoMetrics team as they expand the company and accelerate their impact. His background in financial and strategic advisory work is critical.

As one of the first hires at Next Street, an economic development firm helping small businesses and nonprofits grow, Paul has experience working closely with owners and executive teams to navigate long-term strategic planning as well as weathering the day-to-day challenges of running a business.

Prior to joining Next Street, Paul was a Strategy Consultant at Galt & Company where he had the opportunity to develop growth strategies for Fortune 100 companies such as Coca-Cola and Clorox. As an Economic Consultant at NERA, Paul offered experience applying rigorous quantitative analysis to support headlining intellectual property disputes.

Paul received a dual Bachelor's Degree from The Colorado College in Mathematical Economics and Physics.

Tyler Grodi

Coastal Credit Union



Tyler Grodi is a transformative leader and results-driven Chief Executive Officer at Coastal Credit Union. With an exemplary record of leading and growing credit unions, he has proven his ability to direct financial and business operations of a credit union with assets over \$900 million.

Grodi also worked for EFCU Financial in Baton Rouge, LA, where he served as CEO for 11 years. Prior to that, he was Chief Financial Officer at Black Hills Federal Credit Union in Rapid City, SD. His career serving credit unions spans 23 years.

Grodi is recognized for increasing revenue, world-class technology management, building a strong loan portfolio, improving efficiency, cultivating strong member relationships, creating innovative products and services, and execution of strategies to achieve strategic growth.

Grodi attended Bowling Green State University where he received his Bachelor's Degree in Accounting.

Emma Hayes

State Employees' Credit Union (SECU)



Emma Hayes serves as Chief Culture Officer at State Employees' Credit Union (SECU). Emma brings over 25 years of experience partnering with individuals and organizations seeking to advance their staff both personally and professionally. Hayes leads the oversight, direction, and administration of the Credit Union's Diversity, Equity, and Inclusion initiatives, as well as leadership training and programs to ensure the ongoing culture within the organization.

Prior to accepting her new position at SECU, Hayes served as the Director of Learning and Development for Local Government Federal Credit Union, where she launched The Institute of Leadership, a program designed to foster a cohesive leadership language and advance leadership at all levels of the organization. Hayes' experience also includes her position as Chief Diversity Officer for the African American Credit Union Coalition, leading a team of diverse professionals focused on shaping organizational culture competence, promoting more diverse practices, and encouraging inclusive policies.

She is a two-time graduate of North Carolina State University receiving an undergraduate degree from the Poole College of Management with a concentration in Finance, minors in English and African American Studies, then returning to receive a Masters of Education in Training and Development.

John Hewa

Rappahannock

Electric Cooperative



John D. Hewa is REC's President and Chief Executive Officer. Hewa has more than 20 years of leadership experience in the electric utility industry with an emphasis in technology and management of public and cooperative power utilities. His experience also spans technical and executive roles managing electric, water, wastewater, and wireless and fiber optic telecommunications systems. Hewa holds a deep appreciation for the cooperative business model.

Hewa serves as immediate past chairman of the Board of Directors of the U.S. Energy Storage Association, a non-profit organization in Washington, working with utilities, industry, and stakeholders to promote the adoption of energy storage technologies. From 2013-2020, he also served on the Board of Directors of the Smart Electric Power Alliance, an educational non-profit headquartered in Washington, DC, working to advance the integration of clean energy solutions and smart technologies into the grid. Hewa is a director on the Board of the Virginia Chamber of Commerce looking out for Virginia's businesses interests, and is a Board member of the Fredericksburg Regional Alliance, and Fredericksburg Regional Chamber of Commerce promoting economic development across the region.

Hewa holds a Bachelor of Science in electrical engineering and a Master of Science in engineering management from the University of Tennessee. He also earned his Doctor of Engineering at George Washington University focusing on engineering management, researching and modeling energy storage for electric cooperatives in the PJM structured wholesale electricity market. Hewa is a registered professional engineer.

John Holdsclaw IV

Rochdale Capital



John Holdsclaw IV currently serves as president and CEO of Rochdale Capital. Rochdale Capital was formed to advance the development of community ownership and asset building in rural and urban distressed communities. Prior to Rochdale Capital, John served as Executive Vice President of Strategic Initiatives at NCB.

In addition, John worked as director of policy and development at Capital Impact Partners, a national certified CDFI, where he developed and implemented the organization's public policy strategy. John worked at the National Head Start Association, the only national organization dedicated solely to the Head Start program and community as grassroots coordinator and associate director of its government affairs division.

Mr. Holdsclaw currently serves on the board of trustees of Global Communities, board of directors of Groundswell, Partner for Common Good (CDFI), and American Bankers Association (ABA) Stonier Graduate School of Banking.

Michael Huff

Navy Federal Credit Union



Michael Huff is the Vice President of Government Relations and Public Policy at Navy Federal Credit Union. Established in 1933 with only seven members, Navy Federal now has the distinct honor of serving over 11 million members globally and is the world's largest credit union. As a member-owned and not-for-profit organization, Navy Federal always puts the financial needs of its members first.

Before his current position at Navy Federal Credit Union, Huff was the Vice President of Director and Government Relations at the Federal Home Loan Bank of Atlanta. He also worked at Ginnie Mae as the head of Government and Stakeholder Relations and as a Senior Advisor in Congressional and External Relations.

Huff has extensive experience in developing and implementing strategic government relations and political advocacy solutions for organizations ranging from small businesses to cabinet level executive branch departments to global financial institutions.

Huff received his MBA from The Johns Hopkins University and received his Bachelor's Degree in Political Science from Troy University.

Mark Huth

**Group Health Cooperative of
South Central Wisconsin**



Mark Huth, MD, is President and CEO of Group Health Cooperative of South-Central Wisconsin (GHC-SCW), a position he has held since January 2016. Mark has also served GHC-SCW as Chief Medical Officer, Chief of Staff, Clinic Site Chief and as a member of the Board of Directors.

He is board certified in Family Medicine and continues to see patients at GHC-SCW clinics. Prior to joining GHC-SCW, Dr. Huth worked within the University of Wisconsin-Madison Department of Family Medicine clinics; he also did his residency training and served as Chief Resident at UW-Madison.

He completed his medical school training at Oregon Health and Sciences University in Portland, where he received the Alpha Kappa Kappa award for “outstanding dedication and skill in the care of patients.” Dr. Huth did his undergraduate studies at Concordia University in Portland, Oregon, where he was a Presidential Scholar and earned a bachelor’s degree in Management and Communications.

Dr. Huth’s first career was in music, working as a professional pianist, organist and choral director, as well as a product designer for a classical organ manufacturer. He continues to be involved in music as his schedule allows. Dr. Huth lives in Madison, Wisconsin, with his wife and family.

Eric Itambo

CoBank



Mr. Itambo, 51, was appointed chief banking officer effective July 1, 2018. He is responsible for all business segments and banking product groups, capital markets, digital banking services and oversight of the Farm Credit Banking segment.

Prior to joining CoBank, Mr. Itambo spent over 20 years with Citigroup, most recently as Managing Director and U.S. Head – Commercial Lending Management for Citigroup's Global Commercial Banking Group. During this time, Mr. Itambo built extensive experience in corporate and investment banking, capital markets, commercial banking and commercial real estate finance businesses, including risk and portfolio management.

Mr. Itambo serves as Chairman of the Board of Directors of Farm Credit Leasing.

Esteban Kelly

Federation of Worker Cooperatives (USFWC)



Esteban Kelly is the Executive Director of the U.S Federation of Worker Cooperatives and has offered visionary leadership and creative strategy in economic democracy and co-op movements for over twenty years. He is a co-founder and worker-owner of AORTA (Anti-Oppression Resource & Training Alliance), a worker co-op that builds capacity for social justice movements and projects through intersectional training, consulting and facilitation.

He has served on numerous boards including the Democracy At Work Institute, the U.S. Solidarity Economy Network, the National Cooperative Business Association CLUSA International (NCBA CLUSA), the LCA land trust, and CICOPA (the international federation of worker cooperatives). Esteban previously worked at the New Economy Coalition and is an advisor to the Movement for Black Lives policy table; Beautiful Trouble, a global network of artist-activist trainers; and the Institute for the Cooperative Digital Economy.

Esteban is a recent recipient of a Philadelphia Social Innovation Award for Public Policy and in 2018 he was honored for his legislative activism by the California State Assembly and also by U.S. Sen. Kirsten Gillibrand. Esteban recently co-chaired the Philadelphia Food Policy Advisory Council as a mayoral appointee after co-founding both its Zero-Waste and its Workforce and Economic Development subcommittees.

Dietrich Kuhlmann

Navy Federal Credit Union



Dietrich Kuhlmann is the Chief Operating Officer at Navy Federal Credit Union. Kuhlmann, who first joined Navy Federal in 2019 as head of Branch Operations before moving to the position of Chief Real Estate Lending Officer, oversaw the credit union's operational functions and 20,000+ employee workforce in service of its members. He previously volunteered on Navy Federal's Board of Directors from 2010-2012, where he served on the Membership Committee and Supervisory Committee before military orders relocated him outside the Greater Washington, D.C. area.

Kuhlmann notably served as a career submariner with a sub-specialty in financial management. He completed 7 finance assignments at the Pentagon, the final of which was as Programming Division Director on the staff of the Chief of Naval Operations. In this role, Kuhlmann was responsible for the U.S. Navy's \$800 billion, 5-year capital allocation process, particularly the development of resource allocation options to address challenges facing critical readiness, personnel and force development.

Kuhlmann attended the United States Naval Academy where he received a Bachelor's Degree in General Engineering. He then moved on to receive a Master's Degree in Engineering Management from The Catholic University of America.

Mo Manklang

U.S. Federation of Worker Cooperatives



Mo Manklang (she/they) is the Policy Director for the USFWC, leading policy efforts at the federal level, as well as working with membership and partners on state and local priority-setting and organizing.

Mo has been a local and national organizer for cooperatives and social justice issues in a variety of roles, including five years with Philadelphia's social impact news and events group Generocity.org.

A Philadelphia native, Mo is a founding board member of the Philadelphia Area Cooperative Alliance, and has had the privilege of serving many organizations throughout her career, including Philadelphia's Sustainable Business Network, The Bechdel Test Fest, an annual festival highlighting women, trans, and gender non-conforming comedians in Philadelphia, and the Alliance for a Just Philadelphia, a grassroots coalition fighting for social and economic justice.

Jim Matheson

National Rural Electric Cooperative Association (NRECA)



Jim Matheson is Chief Executive Officer of the National Rural Electric Cooperative Association (NRECA), the national service organization that represents the nation's more than 900 private, not-for-profit, consumer-owned electric cooperatives, which provides service to 42 million people in 47 states. Jim joined NRECA in July 2016 following distinguished careers in both the public and private sectors.

Prior to joining NRECA, Jim served as Principal, Public Policy Practice for the international law firm Squire Patton Boggs, based in Washington, D.C. From 2001 to 2015, Jim was elected to serve as a United States Representative from Utah for seven terms. During his tenure on Capitol Hill, Jim was known as a legislator who was able to work with colleagues on both sides of the aisle.

He was Chief Deputy Whip for the House Democratic Caucus and served as co-chairman of the Blue Dog Coalition. Jim also was a member of the House Energy and Commerce Committee, as well as the Financial Services, Transportation and Infrastructure, and Science Committees.

Prior to entering government service, Jim worked in the energy industry for several years.

Jim was born and raised in Salt Lake City, Utah. He received a Bachelor's Degree in Government from Harvard University, and an MBA in Finance and Accounting from UCLA. Jim's wife, Amy, is a pediatrician, and they have two sons, William and Harris.

Mary McDuffie

Navy Federal Credit Union



Mary McDuffie is president and CEO of Navy Federal Credit Union, headquartered in Vienna, Virginia.

She joined Navy Federal in 1999 as senior vice president for marketing and product development and was later promoted to executive vice president for lending, where she led the credit union's consumer, credit card, mortgage and equity lending activities. She then moved to executive vice president of delivery channels and communications. In this role, McDuffie oversaw digital banking, contact center operations, marketing and research operations. Most recently, McDuffie served as chief operating officer at Navy Federal before assuming her current role in 2019.

Before joining Navy Federal, McDuffie served as senior vice president of marketing for Star Systems, Inc. She began her career with J. Walter Thompson, working in Washington, D.C., and Jakarta, Indonesia. Over her career, she has worked with a wide range of clients, including the United States Marine Corps, IBM, Kodak, Unilever and Freddie Mac.

McDuffie graduated with honors from Wellesley College.

Jerry McGeorge

Organic Valley

(CROPP)



Jerome McGeorge is a well-known figure in the organic farming industry as the CEO of the Organic Valley cooperative. He was born and raised on a family farm in Wisconsin and grew up with a deep appreciation for agriculture and the land.

Under his leadership, Organic Valley has grown from a small, regional cooperative to a nationwide organization with over 2,000 farmer-members and annual sales of over \$1 billion. McGeorge has been instrumental in developing the cooperative's strong brand and marketing strategy, which emphasizes the quality and reliability of its organic dairy products.

He previously served on the Board of Directors of the Viroqua Food Co-op, a natural foods co-op in his hometown. He was actively involved in the co-op's move to a new facility, including spearheading the necessary capital campaign. McGeorge earned a bachelor's degree in Social Work from Middle Tennessee State University in 1992.

The turning point in his career came when he interviewed at Organic Valley and learned that the cooperative movement was the best place to help build a better world. When he is not at work, McGeorge enjoys gardening and spending time in beautiful Southwestern Wisconsin.

Rob McClinton

Small World Communications, Inc.



Rob is the head of Small World Communications, a web hosting and online marketing company focused on small businesses (smallworld.coop). He is a veteran of the Southern California tech scene with roots in several Idealab startups.

Rob is passionate about helping people and organizations identify and achieve their goals using the same cutting-edge tools and best practices larger tech companies deploy. Rob has built several sales and support organizations, led multiple company divisions, trained leaders to develop their management skills, mentored new managers, and taught website planning workshops for local businesses through the SBA.

Rob attended the University of Loyola Chicago where he received his Bachelor's Degree in Business Administration and Economics.

Peter Muhoro

Rappahannock

Electric Cooperative



Dr. Peter Muhoro is the Chief Strategy, Technology & Innovation Officer for REC and the Vice President and General Manager of RE Communications, a wholly-owned subsidiary of the Cooperative. Dr. Muhoro is responsible for developing and monitoring long-term strategies related to the Cooperative's technology systems, new service offerings to the membership and business planning.

Dr. Muhoro is an accomplished electric utility executive with over 15 years of experience in the energy industry. In his most recent role as Vice President of Strategic Industry Research and Analysis at National Rural Utilities Finance Corporation (CFC), Dr. Muhoro led research activities, provided strategic leadership, and consulted with electric cooperative leadership and board members on trends, technologies and the future of electric cooperatives.

Over the course of his career, Dr. Muhoro held several positions working for, and with electric cooperatives. He served as the Chief Strategy Officer at Pedernales Electric Cooperative, the largest distribution electric cooperative in the U.S. Prior to that he was an Advisor at the Cooperative Research Network, the technology research arm of the National Rural Electric Cooperative Association. He serves on the board of the Smart Electric Power Alliance, as well as other advisory committees. He is a sought-after speaker both nationally and internationally.

Dr. Muhoro holds a Bachelor of Science in Physics and Mathematics from Hampton University, a Master of Science and Ph.D. in Applied Physics from the University of Michigan.

Jim Nussle Credit Union National Association (CUNA)



Jim Nussle was named president and CEO of the Credit Union National Association (CUNA) in September 2014. Nussle, is a former eight-term congressman and director of the White House Office of Management and Budget (OMB).

CUNA is the largest and most influential national financial services trade association advocating for America's credit unions. There are nearly 5,500 credit unions nationwide, with 130 million members and almost \$1.5 trillion in assets.

Nussle has long admired the grass roots advocacy strength of the credit union movement. In Congress, he witnessed firsthand the enthusiastic advocacy of America's credit unions.

Nussle also served on the founding board of Growth Energy, a trade association of renewable energy companies and industry partners. He was recruited by his fellow board members in 2010 to help lead the organization as its President and COO. During his tenure, Growth Energy nearly doubled its revenue, increased membership by 18% to become the largest renewable energy association, and successfully navigated several regulatory and legislative challenges.

A native Iowan, Nussle received a degree in political science from Luther College in Decorah, Iowa, and his law degree from Drake University in Des Moines. Nussle and his wife, Karen live in Wisconsin, and have two adult children.

Claude Pugh

National Co+Op Grocers (NCG)



Claude Pugh is CEO of National Co+Op Grocers (NCG), the business services cooperative for retail food co-ops located throughout the U.S. NCG's 145 member and associate co-ops operate more than 200 storefronts in 37 states with combined annual sales of nearly \$2.1 billion.

Pugh joined NCG in 2008 and has most recently served as Chief Operating Officer in addition to serving as the co-op's Interim CEO since April 2018. He previously was General Manager of La Montañita Co-op Food Market in Albuquerque, N.M., for six years and has served as an executive in the grocery industry for more than 40 years.

A native of southwest Virginia, C.E. has spent his entire adult life in the grocery industry. He views improving the food system as a spiritual endeavor and believes food co-ops will continue to lead in creating more just and sustainable local food economies.

Lance Rantala

Blue Hawk HVAC/R Distribution Cooperative



In April 2006, the BLUE HAWK Board of Directors hired Lance Rantala as Chief Executive Officer. Prior to becoming CEO, Lance spent five years working with other purchasing cooperatives, four as Vice President of AMAROK, a drywall distribution cooperative, and one as Regional Recruitment Manager for three cooperatives: AMAROK, NEMEON (a roofing & siding distribution co-op), and YaYa! Bike (a bicycle retailer's co-op). This experience provided him with invaluable knowledge of the co-op business model and the tangible and intangible benefits it affords independent business owners.

Previous to his purchasing co-op experience, Lance worked in sales and sales management roles for CertainTeed Insulation Group and Unimast, a steel stud manufacturer. Before Unimast, he worked as a Project Manager for Insulcon Company, a low-temperature commercial contractor.

Lance has a Bachelor of Science degree in Civil & Environmental Engineering from the University of Cincinnati and an Executive MBA from The University of Chicago Graduate School of Business. A native of the Cleveland, OH area, he currently resides with his wife, Amy, and two sons, Charlie and Wil, in Chicago. His personal interests include spending time with his family, reading, traveling, and golfing.

Glen Sarvady

154 Advisors



Glen Sarvady is a 25 year veteran of the payments and financial technology industries. His firm 154 Advisors helps credit unions and fintechs navigate the rapidly evolving payments and financial services landscape. He is a frequent industry speaker and author, and a founding director of the Technology Association of Georgia's Fintech Society.

Prior to founding 154 Advisors in 2015, Glen co-led McKinsey's payments-focused Global Concepts unit for six years and held numerous senior operating and financial roles at CheckFree from 1997-2005, spanning most of that pioneering payments firm's life as a public company before its acquisition by Fiserv.

Glen is a former Federal Reserve Bank examiner and part of the startup team that launched the University of Pennsylvania Student Federal Credit Union, where he currently serves on the Board of Advisors. He works regularly with CUNA as a payments subject matter expert, and hosts a weekly fintech podcast featuring interviews with industry leaders. Glen also spent 5 years as an elected board member at the Sevananda Natural Foods Cooperative located in his longtime Atlanta home base.

Glen has a BA in Economics/Mathematical Methods from Northwestern University and an MBA from the Wharton School of the University of Pennsylvania.

Cameron Smallwood

United Cooperative Services



Cameron Smallwood is the CEO and General Manager for United Cooperative Services. He has more than 29 years of experience in engineering, technology, operations and management in the electric utility industry.

He graduated from Texas A&M University, College Station with a B.S. in Bioengineering, Electrical Engineering Emphasis, and graduated from the Georgia Institute of Technology with a M.S. in Electrical and Computer Engineering. He is a senior member of IEEE and is a registered professional engineer in the State of Texas.

He is actively involved in the electric utility industry through involvement in several advisory committees for Texas Electric Cooperatives, IEEE, the Rural Electric Management Development Council, the Association of Large Distribution Cooperatives, the Texas A&M Smart Grid Center, and the National Rural Electric Cooperative Association.

Astrid Scholz

Zebras Unite



Astrid Scholz is the CEO of Zebras Unite. Over the course of her professional life, she had the opportunity to imagine and build new ways of how people relate to each other and the planet.

As an Ecological Economist by training, she has worked at the intersection of nature and society. Scholz pioneered methods for using the then new art and science of geographic information systems (GIS) for mapping the economic value of the land and the sea. She is the editor of a book about that. This work directly informed the creation of a large network of marine protected areas along the West Coast of North America and beyond.

She also articulated practical ways for translating the concept of Resilience into design principles for the organizations, communities, and economies we want to live in. An operating system for the 21st century, if you will. This led her to leave her job as President of Ecotrust and co-found Armillaria, to propose and pursue a better way for getting the work done that's necessary to create the world we all want to live in.

Jill Tomalin

Credit Union National Association (CUNA)



Jill Tomalin has more than 20 years of expertise building high performing teams and infrastructures that transform organizations, driving engagement, profitability and growth. She is a change agent with a history of empowering and motivating talent by embracing an entrepreneurial spirit, accountability and values while aligning to a shared vision. As COO of the Credit Union National Association (CUNA) since 2017, Jill manages and optimizes enterprise resources tightly aligned with the CUNA Strategic Plan to deliver measurable business value. She leads to enable internal operations teams to serve as guardians and stewards of enterprise resources. She advocates the creative process by pushing boundaries and reinvention to envision new futures for member credit unions and the credit union movement.

Jill joined CUNA in 2000 and has held numerous positions primarily centered around organizational development, sales and marketing, and revenue-based solutions. Previously, she served in management roles for Dallas-based Texas Credit Union League (now Cornerstone League) and Madison, Wisconsin-based Credit Union Executives Society (CUES).

Jill earned an MBA and bachelor's degree from the University of Wisconsin-Madison.

Matthew Wehland

Momentum Capital



Matt Wehland is responsible for Momentum Capital's business operations strategy and execution. The Momentum Capital family of companies includes Capital Impact Partners, CDC Small Business Finance and Ventures Lending Technology. The Operations team includes Credit, Loan Closing & Servicing, Loan Accounting, Construction Management, Investor Reporting & Compliance, Portfolio Management, Special Servicing, Innovation Lab and Facilities Management.

Wehland joined Capital Impact Partners in 2019 and served as the Senior Director of Lending Operations prior to assuming the role of COO in 2022. He has more than 25 years of experience in the financial services industry. Prior to joining Capital Impact Partners, he served as Senior Vice President at both Capital One and National Cooperative Bank. Wehland graduated from the University of Maryland, College Park with a degree in Political Science.

He currently serves as a board member for his local housing cooperative and is an active member of his church audit committee. Wehland and his husband live in Ellicott City, MD and are active in local historic preservation and watershed management.

Sherry Wu

University of Michigan Credit Union



Xiang (Sherry) Wu is based out of Detroit Metropolitan Area and works at University Of Michigan Credit Union as Vice President of Information Technology.

As an IT executive, Sherry works in management consultant providing strategic advisory services including IT strategy, Governance, Portfolio Optimization and Future State Roadmap. Sherry has proven success managing large scale software development projects and creating highly successful teams. Sherry possesses excellent people management skills with focus on coalition and team building. She is also experienced in Automotive, Healthcare, Retail, Government and Banking/ Financial Service.

Sherry received her M.S. in computer science from Eastern Michigan University and attended University of Michigan where she received her MBA from the Stephen M. Ross School of Business.

Curtis Wynn

SECO Energy



Curtis Wynn is the current CEO of SECO Energy. He is a seasoned electric utility industry executive, board member and thought leader with proven accomplishments through the utilization of strategy execution & scenario planning business processes and strong governance practices.

Wynn has been president and CEO of Roanoke Electric Cooperative in North Carolina since 1997, a not-for-profit electric utility that serves 14,000 members. Prior to that, he was vice president of member services, information technology, marketing and economic development at West Florida Electric Cooperative from 1981 to 1997.

Wynn has nearly 42 years of experience in the electric cooperative industry, similar to Duncan's career, which includes leading SECO Energy as CEO for most of his 43-year tenure.

Wynn received his Bachelor of Science in Business and Computer Information Science from Troy University Dothan.

COOPERATIVE EXECUTIVE ROUNDTABLE

NCBA CLUSA

Staff and Support

Thank you for registering

The following executive bios are
listed alphabetically.

Tamela Blalock

NCBA CLUSA



Tamela Blalock is Vice President of Cooperative Relations at the National Cooperative Business Association CLUSA International (NCBA CLUSA), where she enhances engagement and impact with the trade association among the collective cooperative leadership community. NCBA CLUSA is the primary voice for cooperatives in the U.S. that use the cooperative business model to empower people in their businesses and communities.

During the past 20 years, Tamela has worked for several Washington-area institutions including the Central Intelligence Agency, Washington Football Team, Washington Post and George Washington University. Prior to joining NCBA CLUSA, Tamela most recently served as the Executive Director of Academy of Pelvic Health Physical Therapy (during their name change from the Section on Women's Health of the American Physical Therapy Association); and she very fondly served as the Senior Director of Membership Services for the National Association of Wholesalers-Distributors (NAW). She is also a very active member of the American Society of Association Executives (ASAE) and the Professional Convention Management Association (PCMA). Tamela has served on the PCMA Global Board of Directors, and is an alumnus of the ASAE 2016-2018 class of DELP (Diversity Executive Leadership Program) Scholars. She is also one of the co-founders of the Association for Women in Events (AWE).

Tamela has a bachelor's degree in Marketing from Georgetown University and a master's degree in Business in Tourism Administration from The George Washington University. Originally from the best state (according to Tamela) of Ohio, she grew up abroad as a military child and resides in Alexandria, Virginia where she dabbles as a home chef. A fun cooperative fact about Tamela is that she has exclusively banked at credit unions her entire life, a practice initiated by her parents.

Diana Houston

COOPR8



Diana Houston is a long-tenured veteran of the credit union sector. She 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. During this time, she was an active participant on regional and national committees and boards in the credit union space.

Diana has been recognized for her contributions with the Eloise Woods Award for Distinguished Service. Diana retired from the trade association at the beginning of 2000 and has been working with COOPR8 Consulting and the National Cooperative Business Association (NCBA CLUSA) on projects that will promote collaboration among co-ops across all economic sectors. She lives in the Atlanta area and enjoys spending time with her two daughters and a granddaughter.

Mike Mercer

COOPR8



Mike Mercer has dedicated his career to advancing the capabilities of American credit unions in fulfilment 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. He was tasked to work on a relatively new project called US Central Credit Union, then the credit union system's primary point of connection to the wholesale money markets. In 1980, during a severe system-wide liquidity crisis, Mike left US Central to lead the insolvent Georgia Central Credit Union, one of US Central's members.

Over his career, Mike served on many regional and national credit union and co-op support organizations. Among them, he served on the AACUL, CUNA and NCB boards, holding chairmanship roles on each. He served on numerous other boards and committees throughout his career. In addition, he organized an international partnership with credit unions in Poland, which was formalized in 1995. Another partnership with credit unions in the UK was established in recent years.

Mike has been recognized for his work with many awards of appreciation. Among them are the credit union system's highest recognition, the Herb Wegner lifetime achievement award. In addition, Mike was inducted into the Cooperative Hall of Fame. For his work in Poland, he was recognized with the Knights Cross, the highest governmental award to non-Polish citizens.

Aaliyah Nedd

NCBA CLUSA



Aaliyah Nedd serves as Director of Government Relations for the National Cooperative Business Association (NCBA CLUSA). In this role, she leads NCBA's federal, state, and local outreach and advocacy work to develop, advance and promote cooperative enterprise.

Prior to joining NCBA CLUSA, Aaliyah worked on a variety of policy issues at the National Association of Counties (NACo). Most recently she served as the Associate Legislative Director for Agriculture/Rural Affairs and Immigration.

Aaliyah holds degrees in International Studies and Russian and is a graduate of the University of Florida.

Doug O'Brien

NCBA CLUSA



Doug O'Brien is the President and CEO of the National Cooperative Business Association CLUSA International (NCBA CLUSA), where he works with the cooperative community, both domestically and internationally, to deepen its impact on individuals and communities. NCBA CLUSA is the primary voice for cooperatives in the U.S. that use the cooperative business model to empower people in their businesses and communities. Doug has been with NCBA CLUSA since 2016, where he served as the Executive Vice President of Programs before becoming President and CEO in January 2018.

Before coming to NCBA CLUSA, Doug led the work of the White House Rural Council and served in top positions at the U.S. Department of Agriculture Rural Development, a community economic development agency with over 40 programs and 5,000 employees that annually finances more than \$30 billion dollars. Doug has also worked in the U.S. Senate, U.S. House and for two governors. His experience in academia includes teaching, researching and writing at the University of Arkansas Agricultural and Food Masters in Law Program and Drake University Law School.

Doug grew up on a diversified farm in Dubuque County, Iowa, and holds degrees from Loras College (Dubuque, Iowa), the University of Iowa Law School, and the University of Arkansas Masters in Agricultural and Food Law Program. He lives in Takoma Park, Maryland, with his wife, Alisa, who works in policy and communications consulting. He enjoys biking, travel, spending time with his three children, and his memberships in several consumer co-ops and credit unions.

Valeria Roach

NCBA CLUSA



Ms. Valeria Roach is the Executive Vice President and Chief Financial Officer of the National Cooperative Business Association Cooperative League of the United States of America (NCBA CLUSA.) Ms. Roach has 30+ years of experience in the profit, not-for-profit and NGO industries in domestic and global operations, she developed extensive expertise in international development across Africa, Asia, Central America, Eurasia, and the Middle East. She is recognized for competence in financial management, government contract acquisition, government contract accounting, program management, compliance, and capacity building. She has strong leadership, business, and financial acumen, and has a visionary approach to strategic thinking.

Val is the Treasurer of the Board of Directors of Rochdale Capital which provides financing and technical assistance to cooperative businesses and other community-based organizations. She is the Chair of the Board of Directors of the Cooperative Business International, Inc. (CBI Global), who works with coffee and spice producers in S.E. Asia and combines production partnerships with social responsibility and sustainability. She serves on the Board of Directors of the Food Cooperative Initiative (FCI), which improves the success and sustainability of new food cooperatives.

Ms. Roach earned her master's degree in business administration (MBA) and Accounting from the University of Phoenix and has received executive advanced certificates from Massachusetts Institute of Technology (MIT) Sloan School of Management, Leadership America Premier Women's Leadership Program, and the Center for Creative Leadership. She enjoys the outdoors and recreational time with family and friends.