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Fall 2021

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## NACUC Holds Successful Roundtable Forum in Denver



Dr. Luis Ramos (Nutmeg State Financial); Roberta Charles (Kauai Government Employees FCU); Roger Salter (U.S. Eagle FCU) and Pablo DeFilippi (Inclusiv)

From October 13-16, board chairs and directors from around the country gathered in Denver at NACUC's 45th Annual Roundtable Forum for the first live and in-person event since the COVID-19 pandemic began. Topic discussions centered around lessons learned during the past 17 months as well as a look at where things are headed for financial services.

To kick off the first day of the program, Jon Ungerland of [DaLand LLC](#) gave an eye-opening presentation titled "Digital Erosion of Community, Digital Transformation of Currency." On Day 2, [Inclusiv's](#) Pablo DeFilippi led a panel of three board chairs (pictured above) from community development credit unions (CDCUs) that specialize in serving populations within their communities that have limited access to safe financial services. As one panelist put it, "We're able to reach more members who are financially vulnerable which in turn benefits the whole community. It's a win-win for everyone." These highly-rated presentations set the tone for lively and meaningful discussions during six roundtable breakout sessions that followed.

During vendor presentations Roundtable attendees also had the opportunity to learn about valuable services aimed at helping boards with CEO search and recruiting, executive benefits plans, strategic planning and more. With the support of Roundtable Forum sponsors [CUNA Mutual](#), [DDJ Myers](#), [Gallagher Executive Benefits](#), [Humanidei](#) and [OM Financial](#), NACUC was able to provide the highest caliber educational experience for our members and attendees.

After a successful meeting in Denver, plans are already being made for the 46th Annual Chairs Roundtable Forum, October 12-15, 2022 at the iconic [Omni Parker House Hotel](#) in the heart of historic Boston. Be sure to mark your calendars and watch for more details in spring 2022.

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## Chuck Smith Receives Gene Ball Leadership Award



Chuck Smith of First New York FCU pictured with NACUC Executive Director Celeste Shelton

Chuck Smith, board chair of First New York Federal Credit Union (Schenectady, NY), was honored with NACUC's 2021 Gene Ball Award during the 45th Annual Chairs' Roundtable Forum in Denver, Colorado.

In 1990, Smith was elected board chair of First New York Federal Credit Union, then called First Teachers. Not long after, he became involved with NACUC and started attending the Chairs' Roundtable Forums. In 1998, he was elected to NACUC's board of directors serving as chair from 2003 to 2007. Smith remarked, "I wanted to give back to an organization that's given me so much in my role as board chair. It's been an honor to be a part of it and now to be recognized with this award."

Smith's service with First New York Federal Credit Union began more than 50 years ago as a volunteer field rep. He served on the supervisory committee before being elected to the board of directors in 1984. As a career educator, he spent more than 25 years as a teacher and school principal.

Congratulations to Chuck Smith for his dedication and leadership!

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## **Ramos and Schwartz Re-Elected to NACUC Board**

On October 15 at NACUC's Annual Business Meeting, incumbents Luis Ramos of Nutmeg State Financial Credit Union and Marlene Schwartz of State Department Federal Credit Union were re-elected to three year terms on the NACUC Board. At a reorganization meeting, the Board voted to keep the same officers.

### **NACUC Board of Directors 2021-2022**

Jerry "Coach" Hauck, Board Chair  
Dr. Luis Ramos, Vice Chair  
Jim Hollingsworth, Board Treasurer  
Pat Tollefson, Board Secretary  
Marlene Schwartz, Director

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It was great to once again be able to hold the Roundtable Forum in person after two years apart.

I regret that I was unable to attend the Roundtable. However, while attending another conference in Idaho the prior week, a member of our credit union who was in our group tested positive for COVID. According to protocol, our group immediately left the meeting to quarantine at home. Even though I am vaccinated and had two COVID tests with negative results, my doctor recommended that I avoid crowds and travel for another week.

Feedback from Roundtable Forum evaluations was positive. We'll be looking at those comments to make the Roundtable an even better event in Boston in 2022. Ideas for topics for next year's Roundtable were also provided, which the board will use to determine topics for next year.

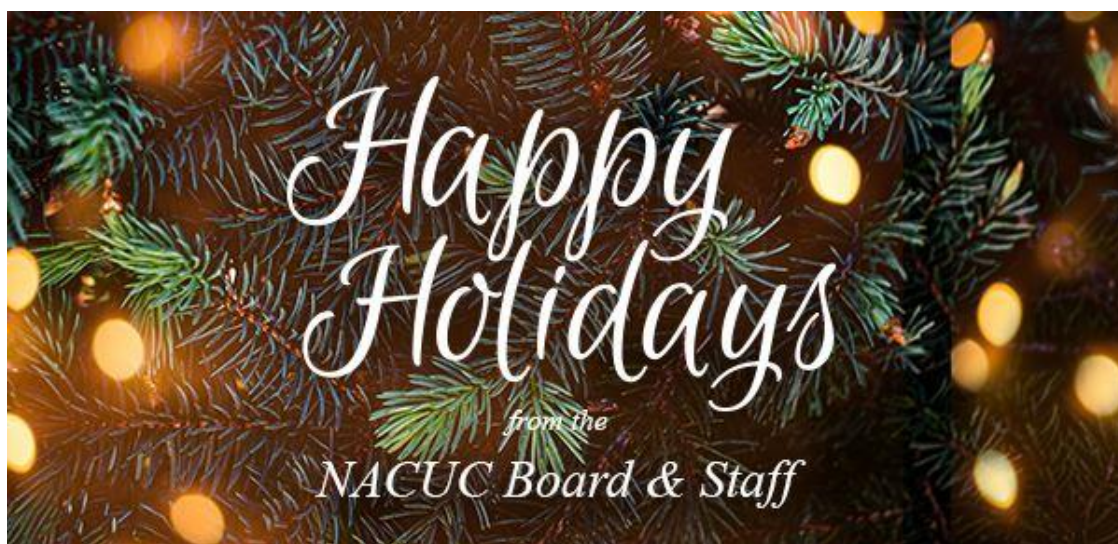
An exciting development is the new board member training session that will be introduced in Santa Fe in conjunction with the [2022 Leadership Development Seminar](#). I was fortunate to be able to work with a Task Force which developed the idea and an outline for the new program. The Task Force felt that there's a need for education to give new directors a better understanding of the responsibility of being a credit union board member.

The Task Force recommended to create a separate session so that new board members will be with others in the same situation. They felt that being with board chairs might be intimidating and new directors may not feel as open to share their thoughts, which is the key to the Leadership Seminar and Roundtable Forum.

Tim Harrington, who facilitates our [Leadership Development Seminar](#), will be presenting the new program with input from NACUC. It will take place on Sunday, May 22 before the Financial Mastery Course in Santa Fe. If you and other directors are new to your board, you are invited to attend this program.

Be safe and continue to protect yourself during the Holiday season. Happy Holidays to all!

*Jenny Hauck*



# noteworthy

## Memberships Renew in January

Memberships make up the lifeblood of our organization and your involvement is extremely important to our mission of bringing together credit union board leaders to share ideas and successful strategies. In fact, NACUC is the only organization in the country that is dedicated exclusively to the education, training and collaboration of board chairs and future board leaders.

NACUC Board recently approved an increase in annual dues to \$650 to offset rising costs and to be able to continue to provide quality services and programs to members.

Watch your email inbox in January for NACUC membership renewal notices. **If the billing contact for NACUC has changed at your credit union, email [lauren@nacuc.org](mailto:lauren@nacuc.org) with their information. This will ensure a timely renewal and avoid a lapse in member benefits.**

## Have a Question? Find Answers on the Listserve!

With 60 members and growing, the [NACUC Listserve](#) has become a valuable resource for board chairs and directors looking for information on topics including creating a successful associate director program, the pros and cons of mobile payment apps, developing a competitive CEO benefits package and more. If you're not already subscribed and want to learn about NACUC's Listserve, [click here](#).

## In Memoriam: Rose Rangel



With heavy hearts we share with our members that former NACUC board member Rose Rangel passed away on November 20, 2021. Rose was an avid supporter of NACUC and the credit union movement. Not long after being elected board chair of Generations Federal Credit Union in 2002, she began attending NACUC's Roundtable Forums. She served on NACUC's board from 2009 to 2018, serving as board chair for three years. Rose was instrumental in creating and

fundraising for the Norma Benson Memorial Scholarship Fund to give board chairs of modest-means credit unions the opportunity to participate in NACUC's educational programs. Rose mentored many board chairs over the years generously giving of her time and experience. She will be missed by the many friends she made through her participation in NACUC. To visit Rose Rangel's memorial page [click here](#).

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