



A MESSAGE FROM ACUMA BOARD

Pam Davis

2019: A Pivotal Year for Our Organization

Our Leadership, But Not Our Mission, Is in Transition

By Pam Davis

Did you attend one of our workshops or a webinar this year? We had more than 175 total participants attend our San Diego and Nashville workshops, a total almost identical to last year’s stellar attendance.

Bob, Tracy and the team strive to offer top-notch educational opportunities at each event, and the attendance proves ACUMA members appreciate the valuable educational and networking opportunities.

As Todd Lambright, one attendee at this year’s workshops told us, “I appreciate what you all contribute to credit unions, big and small, and have no doubt that everyone [attending the workshops] has a ton of takeaways to go back home with.” Todd is Vice President of Sales at Georgia’s Own Credit Union, and we appreciate his support.

In fact, we want to thank all of you who attended our workshops and fall conference, especially those who have been attending our conference for years. You are what keeps ACUMA going—and growing.

LOOKING BACK ...

As I complete 10 years serving on the

ACUMA board and the final months as its Chair, I can tell you that 2019 is pivotal and exciting year for ACUMA.

We have grown and matured with Bob Dorsa as our President and leader for the 23 years since ACUMA was founded. For those of you who are new to ACUMA or the credit union industry, Bob is a very well-known credit union leader and a founder of ACUMA. His 45 years of contributions to credit unions and CUSOs have been substantial. Dur-

ing his years of service at the helm of ACUMA, Bob managed all facets of our business.

In 2018, Bob met with the Board and shared his desire to step down as president in January 2020 and continue with ACUMA in a role focused on event planning as our Senior Advisor.

Bob will stay on with ACUMA, helping with the leadership transition and ensuring that our events, including the Annual Conference and the association’s exhibit at the National Association of Realtors annual

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convention, continue to delight members and exceed expectations. We are so pleased that he is continuing with ACUMA in a new capacity beginning in January.

LOOKING AHEAD ...

As I announced last year, longtime ACUMA colleague and supporter, Tracy Ashfield, will become ACUMA's next president. She brings more than 30 years of mortgage banking experience to her new role. Before forming her consulting company, Ashfield & Associates, she held leadership positions with both CUNA and CUNA Mutual.

Tracy shares Bob's passion for credit unions. In addition to her consulting business that has taken her into many of your credit unions, she has worked with ACUMA for nearly two decades. The



Bob Dorsa will pass the torch to Tracy Ashfield as ACUMA President in 2020.

Board is thrilled that she will bring her mortgage management experience to ACUMA as our new president.

As many of you know, ACUMA is a non-profit organization with an all-volunteer Board of Directors. The board has worked diligently to support the ACUMA management team. I appreciate the support of the all board members—for your time, knowledge and dedication during my two years as chair.

In closing, as Barry Stricklin of Tower Credit Union takes over the role of chair next year, I want to emphasize that our mission is unchanged; we will continue to provide high-quality education and networking for credit-union mortgage lenders and their valued partners. ▲

Pam Davis has served for 10 years on the ACUMA Board of Directors, which governs the organization. She has led the board for the past two years as its Chair. Davis is the Senior Vice President, Branch Delivery and Operations, for Delta Community Credit Union.

WHAT DOES THE ACUMA BOARD DO?

It Provides Guidance for the Non-Profit Association

ACUMA is a non-profit association dedicated to advancing mortgage lending within the credit union space. The ACUMA Board of Directors sets governance for the association and provides guidance to the ACUMA President.

A Board Member serves a three-year term. Terms are staggered. The current Board has seven members. The Board Members are volunteers who have a strong desire to give back to the Credit Union industry and receive no compensation.

Officers of the Board (Chair, Vice Chair, Treasurer and Secretary) are selected by the entire Board at the Organizational Meeting following the Annual Meeting of the membership, normally held in September of each year in conjunction with the annual Fall Conference.

The time commitment for a Board Mem-

ber includes conference calls as needed and two in-person meetings each year, including a planning session and the Organizational Meeting, and attending ACUMA conferences. In addition they may also serve on standing or ad-hoc committees, and participate in occasional special projects.



WHO IS ELIGIBLE FOR A BOARD SEAT?

To be eligible for a Board position, you must:

- Be a member of ACUMA's Primary Member Organizations (CUs and CUSOs).
- Serve as an employee of a Primary Member Organization.
- Accept ACUMA's policies and rules of governance.
- Have the support of your own credit union for serving on the board.

When openings for the Board of Directors become available, ACUMA would welcome interested candidates. Openings will be communicated to ACUMA members through our website and the *Pipeline* magazine.