

## ➤ Our Approach to Credit Union Executive Search

We **meet personally** with the internal leaders of the search process at the beginning and maintain steady contact.

We **study and profile the credit union** financially, operationally, environmentally and culturally.

We adhere to a **strict ethical code**; no selling of ancillary services like SERP's. No conflicts of interest.

We work with all candidates to ensure they are a proper **cultural fit** both for them and the credit union.

Working with the Board we build a detailed **candidate profile** to guide the selection of prospective candidates.

We provide all candidates with a **comparative financial review** of the credit union so they are all reading from the same page.

We **facilitate the first round of interviews** to ensure consistency. We coach the Board on the interview process for the final round.

## ➤ Our Value Proposition

**Sustaining values—ethics, service, stability, culture and agility—are much more than words.** Credit Union leaders live those values and so do we. Working together, we ensure the industry's leadership and their credit unions thrive.

### The O'Rourke & Associates team

(Standing) Managing Director Gene O'Rourke;  
Chief Executive Officer Mike Juratovac;  
(Seated) Senior Director Jean Yip; Senior  
Director Heather Toro; Corporate Services  
Manager Frieda Afandi



# The strategic bridge: aligning leadership and culture



➤ **Each credit union success story has a different plot and characters.** Yet, a few consistent themes are interwoven. Well-rounded leaders working with aligned boards and leadership teams bring results financially and culturally. We have earned our trusted place with leaders. We take the time to study and get to know your culture and credit union. Strategically bridging the potential gap requires a recruiting and consulting firm that understands the credit union business, people and leadership. Our services:

- CEO & Senior Management Executive Search & Placement
- Executive Compensation
- Succession Planning
- Leadership Development

**O'Rourke & Associates has been the trusted, ethics-based credit union Executive Search and Consulting firm for over 25 years.** We have co-written leadership success stories with more than 600 credit unions in:

#### **CEO and Senior Management Executive Search and Placement**

Our comprehensive process is deeply analytic and absolutely interpersonal.

#### **Executive Compensation**

We absorb your current compensation philosophy, benchmarking against the market and determining competitiveness. We then forge a compensation plan that will stand the test of competition and time.

#### **Succession Planning**

Looking at your team today with our mind's eye on your future we develop succession plans that provide your leaders with a career path.

#### **Leadership Development**

Tapping the analytic, the empirical and especially the core of the person, we combine thoughtful leadership assessment and development.

A partial list of recent O'Rourke & Associates clients:

1st United Services, CA  
Addison Avenue FCU, CA  
Air Force FCU, TX  
Altier Credit Union, AZ  
Argonne, IL  
Arizona Credit Union System, AZ  
Cal Bear CU, CA  
Clackamas Community CU, OR  
CommonWealth Central CU, CA  
Constitution State Corporate, CT  
E53 FCU, NJ  
Eagle CU, CA  
Educational Employees CU, CA  
Envision CU, FL  
First American CU, AZ  
Florida Commerce CU, FL  
Government of Guam, Guam  
Greater Nevada CU, NV  
Grossmont School Employees FCU, CA  
Health Associates FCU, CA  
Heritage Community CU, CA  
IC FCU, MA  
Kern Schools CU, CA  
Key Point CU, CA  
Memphis Area Teachers, TN  
Northwest Resource CU, OR  
NIH FCU, MD  
Orange County's CU, CA  
Pacific Service CU, CA  
Patelco CU, CA  
Pinnacle FCU, NJ  
Power Financial, FL  
Redwood Credit Union, CA  
Rocky Mountain CU, MT  
San Diego Metropolitan CU, CA  
San Francisco FCU, CA  
San Francisco Fire Credit, CA  
Selco Community CU, OR  
South Bay CU, CA  
South Carolina Credit Union League, SC  
Spokane Teachers CU, WA  
Stanford FCU, CA  
TECU, KS  
Treasury Department FCU, DC

## ➤ **Our Story—Shared Values**

Earning Trust with Executive Search and related Consulting in executive compensation, succession planning and leadership development is what we exclusively do. We focus with Boards, CEOs and Leadership Teams, providing proven as well as fresh tactical insight.

**We Understand Credit Unions** and the need for the kind of leader who brings financial, operational, marketing and cultural integrity. Long term relationships and success require that the best interests of the institution and its people align.

**A Professional, Customized Approach** is developed for each credit union. With hundreds of success stories in our book of work we co-author yours with you.

## ➤ **Leadership Stories**

The credit unions referenced below are separated by geography and scenario. Yet, they are connected in their mission to serve their members, sustain strong financial performance and honor their unique cultures:

**Replacing an icon** requires a deep study of the credit union's strategy and open attention to the personalities involved. A high-performing credit union in the West grew from under \$100 million in assets to over \$1 billion during the more than 40 years this well-respected CEO led the organization. Finding a leader who could blend with such a flourishing culture required analytic assessment of skills and an engaged interview process. Focusing upon the details enabled us to bring in the right person to continue the living legacy of financial success and cultural harmony.

**The financial storm has forced some leadership changes.** From coast to coast, no one has escaped the furious winds of the past few years. It has led to some leadership changes when "turnarounds" are required. A historically strong Southeastern credit union had fallen precipitously. They were guided by state and national regulators to make a change at the top. Working in partnership with the Regulators, the Board and a very carefully assembled group of candidates enabled us to bring the right CEO to the challenge. Today this credit union is once again performing well.

**An internal CEO search resulting from a careful succession plan** requires absolute discretion and fairness. Our client, a multi-billion dollar credit union in the Mid-West, knew they had three strong leaders upon which their foundation could comfortably stand. Finding a way to the "win" for the credit union and the players was achieved by taking the time to study the scenario. We built upon the team's strengths and helped a unifying leader emerge.

"Although unique in our needs, Patelco Credit Union has had great success in the executive and management search initiatives conducted by O'Rourke & Associates."

Ken Burns, Chief Executive Officer,  
Patelco Credit Union, San Francisco, CA,  
\$3.6B in assets

"The team at O'Rourke & Associates has mastered the art of matchmaking between the Board, Credit Union and CEO which plays a critical role in the decision and selection process when looking for a qualified executive to address today's credit union opportunities and challenges."

Rico Bautista, Chief Executive Officer,  
First American Credit Union,  
Casa Grande, AZ, \$75M in assets

"Working with the team at O'Rourke & Associates has been like an extension of our own organization. They are in tune with the culture, strategy and direction of Heritage Federal Credit Union, allowing us to effectively and accurately pinpoint the right fit for our needs. O'Rourke & Associates is definitely a "go to" resource and partner for executive recruitment."

Ruth Ganon, CCE, President/CEO,  
Heritage Federal Credit Union,  
Newburgh, IN, \$400M in assets