



-Week Ending 1/16/09-

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Thanks to MNB
for this selection of
articles.

Reporting In From FMI Midwinter: On The Money

Notes and comment from "Content Guy" Kevin Coupe...

ORLANDO -- Now that's more like it.

While the first day of the annual Food Marketing Institute (FMI) Midwinter Executive Conference here came in for considerable and deserved criticism for an relatively unchallenging agenda, the second day was a vast improvement, featuring a pair of morning sessions that focused specifically on critical issues facing the retailers and manufacturers in attendance.

"The new transformational economy" was the subject of Thomas J. Blischok's presentation, and the president of consulting and innovation at Information Resources Inc. (IRI) ripped into it with vigor and passion – probably because more than a year ago he was talking about the fundamental changes taking place in consumer attitudes, and the times have proven him to be prescient.

Blischok suggested that current events actually have "no real comparable period in US history," and he urged the audience to recognize and act upon certain realities about both the world and their businesses. Perhaps the most significant of these realities – at least when seen from the food retail perspective, is the shift in consumer priorities when going to the store – using lists to buy only what they need and will consume, using coupons and tracking sales to find the best deals, eating more at home and bring more meals and snacks from home in order to save money, and even engaging in what is called the "downturn diet," which translates to "eating smaller portions, cutting out junk food, drinking a beverage instead of eating a snack, eating a snack instead of a meal, and even skipping meals to save money."

One enormous shift taking place, he said, is away from impulse buying. At the beginning of 2008, he suggested, about 40 percent of buying decisions were being made in the store, while by the end of the year that number was down to 25 percent, and is expected to go even lower this year. "This means that you have to rewire your marketing efforts to compensate for shifts away from impulse purchasing," and the industry has to develop "highly rationalized marketing and merchandising programs" that are "customer-centric."

As a result of all these changes, Blischok said, manufacturers and retailers have to work together to get their assortment right, have to be more specific and relevant about new product introductions, and even have to rethink how they market to shoppers, "since there is a growing resistance to hard-sell tactics."





Other notes from Blischok's presentation:

- Unemployment and the lack of available credit "are driving more shopping decisions than anything else," he said.
- IRI's "misery index," Blischok said, "was causing a "shock to the system" that was forcing consumers to both tighten their belts and change traditional shopping rituals and patterns, and that many of these shifts could be permanent.
- The shopper tradeoff between national brand and private label "is expected to continue well into 2009," he said, "no matter where you are on the economic spectrum."
- The reduction in fuel prices is a "fundamental nonevent" in terms of how consumers see their financial viability.

While Blischok seemed optimistic that the industry will adjust to changing circumstances, a kind of manufacturer-retailer "cooperation" is needed, he said, "to meet shopper affordability needs."

The other presentation was a panel discussion about the business case for sustainability, and focused in large part on findings by the Coca-Cola Retailing Research Council (CCRRC), which brought a wide range of industry personalities together in Beijing last year to focus on this issue.

Some of the most persuasive arguments were made by John Gummer, a member of the British Parliament and the former UK secretary of state for the environment, who noted that he is a conservative politician who believes in global warming. "But I don't care if you believe in climate change or not," he said, "because the world is going to be run as if climate change is happening." He urged the businesses in attendance to get it right when it comes to sustainability issues, because the alternative would be for governments to impose their solutions on business, "and we don't want them getting in our business." By getting ahead of the curve, Gummer said, business can assure that legislation "works with the grain," instead of being drafted by politicians "with no connection to real life."

"We won't change the world unless it is profitable for the market," Gummer said, "because only the market is powerful enough to change the world."

Gummer noted that there are a range of areas in which the food industry can make a sustainable difference – ranging from the use of water and electricity in stores to the sourcing of local products and the elimination of waste – and said that virtually all of these can be positive for the bottom line.

Gummer said, "Sustainability is doing more with less, and I cannot think of a better definition of succeeding in a downturn." In fact, he said, economic downturns are actually a good time for sustainability moves because it is a perfect time "to put our houses in order, be cost effective, and actually make huge profits for our businesses."

There was an extended discussion about plastic bag usage by the panel, with Delhaize's Denis Knoops, senior vice president of business and concept development and new business opportunities, saying that the company's shift to reusable bags just in Belgium had saved in one million euros. Alfred A. Plamann, CEO of Unified Grocers, said that he had "mixed feelings" about plastic bag bans or taxes; he said that while some demographics might be ready for such moves, others would resist them, and that a one-size-fits-all approach to such issues may not be most effective.

Gummer noted that in the UK, Tesco helped shift customers to reusable bags by offering them one point on their loyalty card for every bag they brought into the store during a shopping trip, and that they've already cut plastic bag use by 40 percent.

However, it requires real commitment. Knoops recalled that he was recently interviewing someone for a sustainability-related position with Delhaize, and when the man was handed coffee in a Styrofoam cup, he actually offended and said he didn't want to work for a company with sort of disregard for the environment. "That's why we want you," Knoops said, and he noted that the man has been extremely effective in bringing about sustainable and integrated change.

Note: The complete Coca-Cola Retailing Research Council report, "Sustainability In Retailing," can be read by going to <http://www.ccrcc.org> and clicking on the tab that says "Global."



Reporting In: The FMI Midwinter Executive Conference, Day One

Notes and comment from "Content Guy" Kevin Coupe...

ORLANDO – Coming in the middle of perhaps the greatest financial crisis to hit the United States since the Great Depression seven decades ago, it was noteworthy to a number of attendees that day one of the annual Food Marketing Institute (FMI) Midwinter Executive Conference focused not on the strategic and tactical challenges of doing business in the current economic climate, but rather featured the following:

- FMI and the Grocery Manufacturers Association (GMA) signed a "Joint Memorandum of Understanding Collaboration Agreement," which said that the two organizations have as an objective "to significantly enhance manufacturer/retailer collaboration to achieve greater supply chain efficiency, better ways to serve the consumer, and more efficient use of association and member company resources." (Despite the use of the words "efficiency" and "consumer," this apparently is not the same thing as Efficient Consumer Response.)

The agreement said that FMI and GMA "agree to a new integrated and jointly developed annual industry agenda to eliminate duplication and maximize each organization's strengths in order to achieve a new collaboration model. While the thrust of this effort focuses on industry affairs, we are also committed to improved joint work in public policy and science." The agreement forms a Joint Industry Relations/Industry Affairs Council, or Trading Partner Alliance (TPA), which will develop an annual work plan for the trade associations, and calls for consistent auditing of the associations' efforts as a way of reducing duplication and building on synergies.

(After the signing of the memorandum, there were a number of attendees who seemed to think that it was a precursor to some sort of FMI-GMA merger, and who wondered why the agreement didn't explicitly call for the exploration of such a possibility. Others, however, suggested that here were too many conflicting interests to make such a merger likely or even possible.)

- Peter Lynch, chairman, president and CEO of Winn-Dixie, began the conference by detailing how his company is working its way back to health. Lynch talked about the improvements made to stores and increased focus on improving operations in affluent, resort, Hispanic, urban and Jewish areas. But he emphasized that the key to success is building talent. "It takes great leaders in tough times," he said, adding that store managers are the key to sustained improvement by the company.

- Douglas Conant, president/CEO of Campbell Soup Co., said that even in tough economic times, "fundamental leadership challenges remain the same," and that the keys to leadership success are "a high trust, high performance culture" that is "wrapped around an advantaged business proposition." Conant described his philosophy of leadership by using his own career (moving from General Mills to Kraft to Nabisco to Campbell) and Campbell's revival since the turn of the century as examples, and noted that "engaged people" are critical to any and all success.

- Leslie Sarasin, the new CEO of FMI, laid out some of her priorities for the organization, saying that she wants to "build on the many strengths of this organization and, candidly, to fix the portions that need repair." She said that her goal is to "develop a high-performance business model – one that can be sustained, one that is fiscally responsible, and one that can manage change to maintain our position as an indispensable industry leader and business partner."

- Neil Golub, president and chief executive officer of the Golub Corporation, received the 2009 Glen P. Woodard, Jr., Public Affairs Award, recognizing his leadership in helping the supermarket industry address important government issues.

- Rich Niemann, Sr., chairman of Niemann Foods, received the 2009 Sidney R. Rabb Award today for his community involvement and strong advocacy on behalf of the supermarket industry.

- Milton Sender, chairman and co-founder of Daymon Worldwide, Inc., received the Food Marketing Institute (FMI) 2009 William H. Albers Industry Relations Award for industry relations.





- Supervalu Chairman/CEO Jeff Noddle was honored with the 2009 FMI Herbert Hoover Award for his personal and professional excellence in serving the food retail and wholesale industry.
- Tim Hammonds, the recently retired CEO of FMI, was honored for his more than three decades of service to the trade association.
- David Gergen, senior correspondent at *CNN* and professor of public service at the Harvard Kennedy School, analyzed the incoming Obama administration, reassuring the audience that it would be primarily made up of “mainstream appointees” and that food regulations and food safety would not be high on the new administration’s agenda. Gergen said that this “is a good time to be engaged in constructive dialogue” with Democratic leaders, since, “for Democrats, these people are willing to listen.” And he urged the attendees to begin considering “what an integrated food policy would look like.”

In his presentation, to be accurate, Gergen did talk about the recession, noting that the general feeling is that it will not be “V-shaped,” but rather will resemble a soup bowl, with a prolonged decline, a long plateau (of uncertain duration) and, finally, a slow emergence from economic hardship. And he said that unlike past recessions, it is probably that the jobs that are being lost right now “are not coming back,” and that the nation and private industry “will need to invent new jobs” more in synch with how the nation has changed.

But also to be fair, there seemed to be a tangible dissatisfaction – at least among attendees with whom *MNB* spoke - with the fact that for the most part, consideration of the economy’s impact on the food industry seemed to be limited to gratitude that nobody in the audience was selling cars or in the financial services business, and that even in hard times, people have to eat.

Of course, it wasn’t that long ago that the US automobile business and the financial services industry thought that they were in fine shape, untouchable, invulnerable to the ebbs and flows of the marketplace. If the last few months have taught us anything, it is that there is no such thing as an unassailable position, no such thing as an impregnable advantage. And as Day One of the FMI Midwinter Executive Conference wore down, there were those in attendance who wondered why these basic truths had not yet been addressed, why the conference had not seized the day.

The “New Info Shopper” Forces Broad Shifts In The Marketplace

The *Wall Street Journal* has a report on a new kind of shopper that has evolved in the marketplace, in part because of tough economic times and in part because of new capabilities made possible by technology. This consumer is called the “new info shopper,” and “these people just can’t buy anything unless they first look it up online and get the lowdown. These shoppers have the Internet at work, typically hold information-based or office-park jobs, have some college or grad school, and are often making ends meet with two jobs, kids, and pets on a middle or upper-middle-class income.”

Some interesting statistics that appear to back up this new definition:

- One shopper survey suggested that 78 percent of respondents said that there is not enough information in most advertising for them to draw a conclusion about whether to buy a product.
- According to the *Journal*, “A whopping 92% of respondents said they had more confidence in information they seek out online than anything coming from a salesclerk or other source.”
- Seven out of ten survey respondents said that they check online product reviews before actually purchasing things, and 62 percent said that they spend at least-a half-hour online each week specifically reading consumer product reviews.

The *Journal* writes, “We have seen many of the big market areas convert to an information-driven model -- cars, homes, personal computers and medical care are areas where nearly 4 in 5 shoppers say they gather information on their own from the Web before buying. ‘Do-it-yourself doctors’ (that is, info patients) show up at their doctor with the Web-derived diagnosis in hand, and a list of the medicines they need prescribed. Customers appear at the car dealership with the wholesale price and the model already picked out.



"Information-seeking is not just an activity, it's a way of looking at the world. New info shoppers are proud of the progress they have made in putting facts over pablum."

Now, it is important to note that not every shopper is an "info shopper," and that "there is still a healthy role for big emotional brand appeals and mega-advertising campaigns. For every trend there is a counter trend. But that's not the real new thing in consumer behavior."

Walgreen Positions Itself As Accessible Health Care Provider

The *Chicago Sun-Times* reports that Walgreen Co. is adjusting its marketing strategy, looking to become a more pervasive health care provider and resource for both consumers and employers.

According to the story, Walgreen "is expanding its clinics that operate at company workplaces. The company staffs 360 such clinics, including at Disney World in Orlando, Fla., and at a Harrah's casino in Las Vegas. The company wants to grow to a combined 800 in-store and workplace clinics by the end of August. Walgreens announced Wednesday a 'Complete Care and Well-Being' program that offers business and government employers a cost-saving network for their employees that incorporates Walgreens pharmacies, clinics and private-label goods."

Also has part of this approach, Walgreen is expanding its specialty pharmacy business, "which lets it provide costly medical care, including injections and intravenous therapies, at people's homes."

The company pointed to the success of its loyalty program, according to the story. "The retailer has signed 1.5 million members to its prescription savings club program, which for a yearly fee (\$20 for singles, \$35 for families) offers a three-month supply of certain generic drugs for \$12.99. About 30 percent of the club members are new Walgreens customers," the *Sun-Times* writes. And Kim Feil, the company's chief marketing officer, says that more loyalty programs will be introduced shortly.

The *Sun-Times* writes, "Walgreens executives say the company's strategy to expand access to basic health care will play well with the Obama administration."

CVS Looks To Private Label For Recession Advantage

Bloomberg reports that CVSA is investing more in the development of private label brands, believing that this will give it a differential advantage in a recessionary economy.

According to the piece, an example of the strategy is how CVS "is wooing cash-strapped shoppers with house-brand anti-wrinkle cream that's as much as 30 percent cheaper than L'Oreal SA's Advanced Revitalift."

Private label sales generated 14.5 percent of company sales during 1997, the story says, and CVS hopes to get that up to 20 percent during the next three to five years.



Supervalu To Launch Nutritional Labeling Program

Supervalu announced yesterday the launching of a new program, “nutrition IQ,” a proprietary “nutrition information program designed to help consumers make better-informed, better-for-you food choices right at the store shelf. The program was developed and implemented in collaboration with Joslin Clinic, part of an academic medical center affiliated with Harvard Medical School in Boston that is recognized internationally for its work in the area of health and nutrition, particularly as it relates to obesity and diabetes.”

The program is expected to be in every one of the company's various banners within six months.

According to the announcement, “The nutrition IQ program comes as research shows that consumers are having difficulty making sense of nutrition guidelines and are looking for an easier way to make informed food choices for better health. For example, approximately three in five consumers think diet and nutrition are very important, yet more than half say they need practical tips to help them eat right and 41 percent don't know or understand nutrition guidelines, according to the American Dietetic Association.”

The announcement goes on:

“Nutrition IQ uses established U.S. Food and Drug Administration Nutrient Content Claims as a framework to determine the nutritional benefits of items that pass a set of qualifying criteria and are, at a base level, better for you. Products meeting the threshold criteria are then further evaluated to identify their top one or two nutritional benefits, which are called out for consumers on color-coded nutrition IQ shelf tags.

The program covers 11 different nutrient claims in seven categories with the shelf tags color-coded as follows:

- excellent or good source of fiber are denoted by orange tags,
- excellent or good source of calcium by blue tags,
- excellent or good source of protein by yellow tags,
- low or healthier level of sodium by dark green tags,
- low calorie by a purple tag,
- low saturated fat by a red tag and
- whole grains by a dark orange tag.

The tags are located in an area where consumers naturally look when making food purchases — on the store shelf right below the product's price, unit price and bar code. The at-a-glance cues are designed to help point consumers toward healthy food options. The information serves as a supplement to the more detailed information already found on the ‘Nutrition Facts’ portion of food labels, should consumers wish to compare products further.”

Supervalu said that “the first phase of the program will focus on items found in the center-store grocery, frozen and dairy areas, where research shows that people have the most frustrations and encounter the most questions regarding food labeling. Products in the bakery, deli, meat, produce and seafood categories will be evaluated and tagged as part of phase two. The program will encompass products at all price points, making it easy to find better-for-you foods for every budget. Approximately 14 percent of the 30,000 products evaluated during phase one will receive nutrition IQ shelf tags. Long term, the company expects about 10 percent of all products throughout the store to carry the nutrition IQ tag.

“Products and categories that do not meet the program's threshold criteria, which requires an item to have limited levels of sodium, saturated fat and, in some cases, sugar, or lack significant nutritional value, were excluded from nutrition IQ. Excluded categories include bottled water and soft drinks; candy, gum and mints; coffee and tea; cookies; dietetic foods; ice cream; salts and spices; shelf-stable juices and drinks; shortening and oils; soft drink mixers; syrup; molasses; and baby food. Some of these items, however, may still contain other important nutrients, such as vitamins, minerals or healthy fats, that can fit as part of a balanced diet.”



Sansolo Speaks: Sic Transit Gloria Mundi

by Michael Sansolo

ORLANDO -- There's probably no detail less important to articles in *MNB* than the location where we write them...most of the time. Every now and again, however, the location tells a story.

This week's column comes to you from the Food Marketing Institute (FMI) Midwinter Executive Conference just outside Orlando. And while the conference itself always bears attention as a major gathering of industry leaders, this story is about the hotel. More correctly, it is about the hotel where it isn't taking place.

For years, FMI's Midwinter had the same Florida home - the Boca Raton Resort and Club. Likewise, the Grocery Manufacturers Association (GMA) ran its annual executive event at the Greenbrier in West Virginia. But both meetings have moved and, in the case of the Greenbrier, the hotel itself is the subject of financial woes and mounting speculation on its future.

The reason for the changed locations provides an object lesson on the difficulty of staying on top. Over the past decade, both hotels suffered the indignity of losing their coveted rating status. As one who was lucky enough to stay at both hotels for meetings, the problems were evident. There was no doubt that something was amiss and that suddenly both properties seemed awfully expensive and far less attractive than in the past. While both hotels are spending money to improve their facilities and gain back their status, the Greenbrier, at least, is finding the return trip to the top may be incredibly challenging.

(As an aside here, one recent upgrade made by the Greenbrier was adding wireless Internet, clearly an overdue improvement. But why is it that expensive hotels continue to charge for this service, when lesser hotels provide it for free? But that's another column...)

So the questions become: what can we learn from this and how do we avoid the same fate of seeing our glory and our reputation slide? Luckily, we get lessons almost daily.

We watch the once Big Three of autos slide deeper into troubles and irrelevance.

We read about the on going troubles Microsoft is having with its operating system and the gains being made by upstarts like Mozilla's Firefox into an area Microsoft seemed destined to dominate forever.

We see NBC switch from "must see TV" to "Deal or No Deal" and Jay Leno every night in prime time.

Republicans out there watch their party drift deeply into the minority just a few short years after controlling both the White House and both houses of Congress. (Democrats shouldn't snicker. In 1994, long-time Democratic control of Congress was lost for many of the same reasons.)

It's hard to tell what really goes before a fall. Is it pride, hubris, arrogance or complacency? Is it a combination of all three? Is it inevitable that we must fall or can we stay hungry?

Those are questions that we have to hope the industry leaders gathered at the FMI meeting are no doubt asking themselves in the various discussions held throughout the Midwinter meeting. Those are questions that should be asked by every part of their businesses back at home.

Because while history suggests the mighty always eventually fall, the length of time it takes reflects heavily on the culture within the company. And that culture should include the ability to adapt to changing times while never forgetting what made the company great in the first place.

Back in 1989, Robin Williams starred in a Peter Weir movie called "Dead Poet's Society," in which he played a prep school teacher who invoked a simple Latin phrase - *carpe diem*, which translates to "seize the day" - in urging his students to make every moment count.





In business today, perhaps the better phrase would be *sic transit gloria mundi* (thus passes the glory of the world.)

In short, glory fades unless you fight back very, very hard. And, while you're at it, *carpe diem*, too!

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Kroger To Open Fresh Fare In Dayton

The *Dayton Business Journal* reports that Kroger plans to close one of its stores in the market at the end of the month and convert it to the Fresh Fare concept, which offers more fresh foods, prepared meals, a wine cellar, and a coffee shop.

This is the second Fresh Fare store to be opened by Kroger in Ohio, according to the story, with the other one having been unveiled recently in Cincinnati.

The renovations are expected to last into the summer.

FastNewsBeat

- Following the moves by retailers such as top & Shop, Giant and Wegmans, Safeway said yesterday that "it will offer free prescription antibiotics at its pharmacies in Maryland, Pennsylvania, Washington, D.C. and Virginia, through March 31," according to a story in the *Baltimore Business Journal*.
- The *Wall Street Journal* reports that in the UK, William Morrison Supermarkets plan to expand its workforce by four percent and create more than 5,000 jobs in 2009. According to the story, "the jobs will be created across the board in a variety of positions, such as its Market Street counters selling fresh food. Morrison also said it will train 18,000 employees in the first year of a new training program."
- The *Journal* notes that "there should be no shortage of applicants, given the growing number of people losing their jobs in the U.K. as a result of the credit crunch and economic downturn."
- The *Wall Street Journal* reports that Aldi is cranking up its US expansion plans "and seizing on the economic downturn to lure consumers to its spartan stores and cheap groceries. The discount chain will open at least 75 U.S. stores this year, well above its typical pace, including its first Aldi store in New York City. The company is counting on the economic downturn to crash a traditional barrier to the U.S. grocery business: Americans tend to be loyal to big-name brands."
- *Newsday* reports that Penn Traffic Co. will close seven stores in upstate New York and one in Vermont "as part of its ongoing consolidation." The units will close on or before February 7; the announcement comes a month after Penn Traffic sold its wholesale business to C&S Wholesale Grocers.

The MNB Wal-Mart Watch

- *Forbes* reports that one year into the recession, community resistance to the building of Walmart stores has subsided to some degree, who see the chain as one of the few engines left for economic development.

One study, conducted by the Saint Consulting Group, says that while 68 of survey respondents said they were anti-Walmart two years ago, that number is down to 56 percent. However, the group also says that people sometimes respond differently when the Walmart actually is going into *their* neighborhood.



The story goes on, "Al Norman, the activist behind Sprawl-busters.com, says the level of community resistance to Wal-Mart has spiked sharply, not dropped. He says he expects at least 40% of any superstores that Wal-Mart proposes this year to be challenged, delayed or killed.

"But the economy would appear to be helping Wal-Mart in its bid to promote supporters and minimize noisy opponents. The latter get firepower from groups and Web sites including Sprawl-busters.com, which describes how dozens of communities have fought off Wal-Marts."

- Walmart announced that its Sam's Club division "is hosting a Pharmacy Challenge and Savings Checkup in all of its locations through January 31 where consumers can check prices on their prescriptions and over-the-counter medications against other retailers. Sam's Club guarantees it will beat any competitor price on branded prescriptions. Membership is not required to use a Sam's Club pharmacy."

The Balance Sheet

- Royal Ahold said this morning that its total fourth quarter revenue was up 13 percent to the equivalent of \$8.7 billion (US). In its US operations, Stop & Shop's same store sales were up four percent, while they were up one percent at Giant of Landover and 5.7 percent at Giant of Carlisle.
- France-based Carrefour said that its fourth quarter sales were up just 0.7 percent to the equivalent of \$33.87 billion (US), and that its total 2008 sales were up 5.7 percent to \$129.5 billion (US).

Executive Suite

- Minyard Food Stores announced that Ron McDearmon, a 44-year veteran of the chain, has become the company's third president and chief executive since 2006, succeeding Mike Byars, who has left the company.

According to a statement from Minyard's, "This has been part of our transition plan to a smaller Minyard-only chain since this summer. Mike was instrumental in developing and implementing that plan ... He was brought in to the company to grow and manage a 70 store, three-banner company and lead it into a new direction with its Carnival banner and the launch of the flagship store in August 2006. Mike led the Minyard efforts to deal with the tough economic and retail environment and successfully restructured Minyard. He helped develop and successfully implement the transition plan and was instrumental in selecting the right team to move Minyard's forward."

- Target Corp. announced yesterday that president/CEO Gregg Steinhafel will take on the additional role of chairman when Bob Ulrich retires at the end of January.
- The California Grocers Association (CGA) has hired Keri Bailey, most recently the Director of State Government Affairs for the California and Nevada Credit Union Leagues as CGA's Vice President, Government Relations.