

CLIENT SUCCESS STORY

Building Future Credit Union Leaders

SchoolsFirst Federal Credit Union

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THE OPPORTUNITY

SchoolsFirst FCU's Emerging Leaders program helps Member-facing and support teammembers prepare for leadership roles. As the program grew, program leads—who were also juggling full-time manager roles—struggled to stay aligned, create consistency, and track outcomes.

THE SOLUTION

We worked alongside SchoolsFirst FCU's program leads to strengthen the program's structure and outcomes. Together, we unified the curriculum to ensure consistency and tie it more closely to existing learning efforts. The application process became more open and transparent, helping to reduce bias and expand access. Managers received clearer expectations, including regular check-ins and one-on-one development conversations with participants. To track success, we added pre- and post-program assessments. Alumni were also brought back as mentors and speakers, deepening engagement and connection.

THE IMPACT

Broader Reach

A more inclusive process increased applications by 28%.

Clearer Results

Progress measured through retention, promotions, transfers, and assessment data.

Enhanced Manager Support

Managers became more active partners in reinforcing learning and supporting growth.

AT A GLANCE

CHALLENGES

- Balancing program leadership with manager duties
- Gaps in consistency, collaboration, and alignment
- Limited insights into the program's impact

BENEFITS

- Expanded access to more potential leaders
- Clearer program goals and success measures
- Improved manager and support



CAROLYN REEVES

Workplace Strategist

"By improving processes, building stronger collaboration, and validating the great work of this team, we've created a more solid foundation for developing future leaders at SchoolsFirst FCU."