

Callahan & Associates

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How to Build an Emerging Leaders Program

Callahan Client Webinar Series





Our Speaker

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About Chartway



Headquartered in
Virginia Beach, Virginia

33 Branches Across
Virginia, Utah, & Texas



265,000+ Members



3.2 Billion in Assets



560 Team Members



Drop in Chat

Where is your organization today with building an internal leadership pipeline - just getting started, actively developing one, or refining what you already have?

Agenda

1

The Challenge & Opportunity

Why a leadership pipeline matters

2

Our Design Philosophy

How we built the program

3

Selecting Emerging Leaders

Potential over position or performance

4

The Learning Journey

Pillars, cadence, and a month in the life

5

Measuring Impact

Results, promotions, and engagement

6

Lessons & Advice

For building you a program

The Challenge/ Opportunity



1

Creating a strong internal leadership pipeline is challenging for many credit unions

2

An increasing focus has been placed on **strategic succession planning** - not just for the c-suite but also for other key positions to maintain smooth operations

3

Retention of high-potential talent especially during competitive career markets proves challenging – high potential team members expect clear career paths, development opportunities, & visibility to future growth

Our Design Philosophy

LEADERSHIP CAN HAPPEN IN ANY ROLE

A reigning philosophy at Chartway is that leadership can happen anywhere, in any role. We didn't want organizational structures or titles to limit a team member's potential, so we wanted to ensure intentionality with the program application process.

COMPETENCY-BASED DESIGN

We wanted the program to be grounded in Chartway's leadership competencies, so we aimed for every learning experience being intentionally designed to reinforce the skills and behaviors expected of future leaders.

STAFF TO SUPERVISOR LEAP

The leap from team member to supervisor is significant, so we wanted to create a safe place for aspiring leaders to build confidence through experiential learning and practice critical leadership skills before promotion.

MANAGEABLE & MEANINGFUL

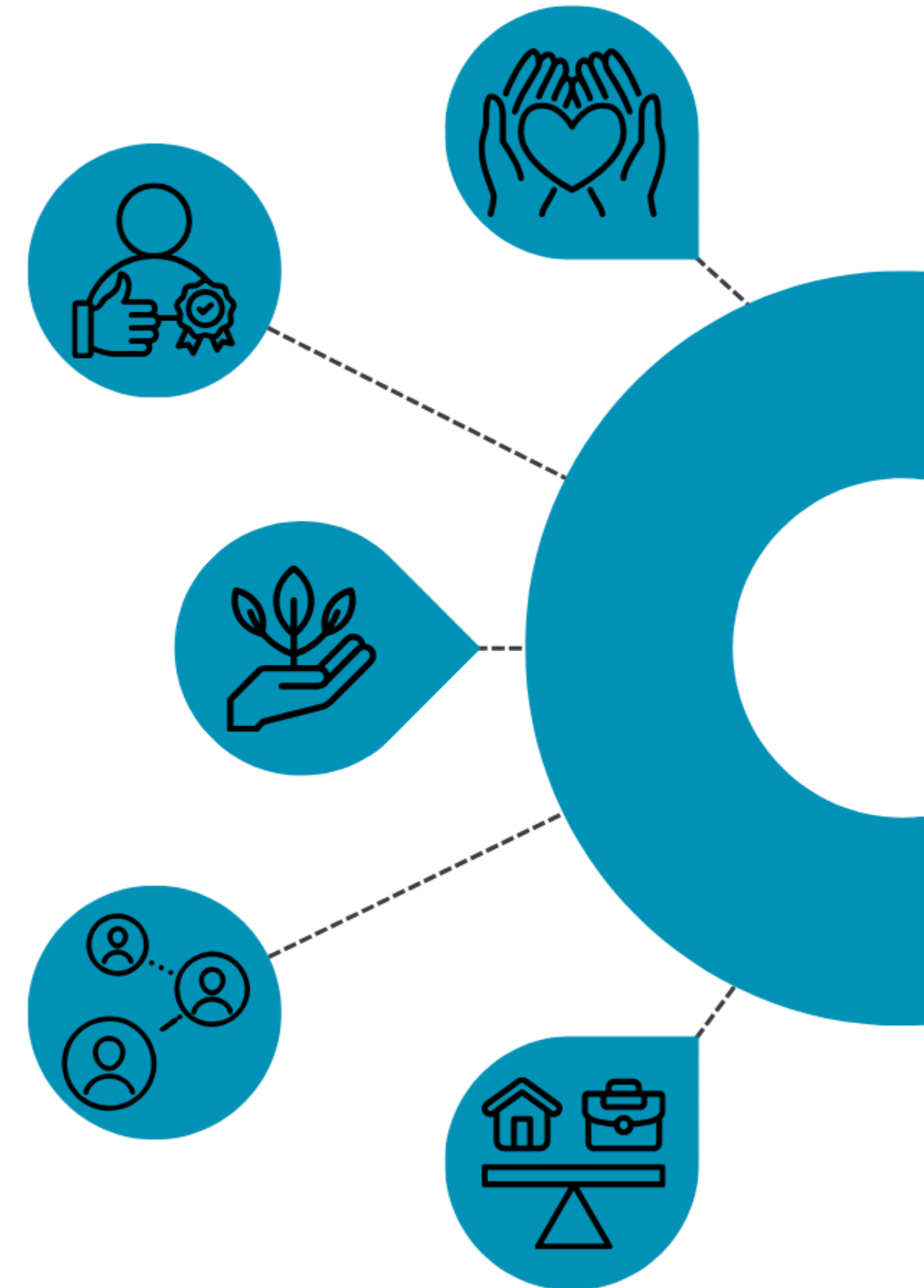
Growth opportunities are most effective when they are manageable, so we wanted to aim the experience to fit alongside participants' day-to-day responsibilities while still delivering meaningful leadership development.

SHARED INVESTMENT IN LEADERSHIP

To build credibility and connection, we knew it was important to incorporate leaders and subject matter experts from across Chartway, ensuring the experience reflected the broader business.

MANAGER SUPPORT MATTERS

We knew manager support was essential to helping participants balance development with day-to-day responsibilities while turning learning into lasting behavior change.



Qualities of an Emerging Leader at Chartway



Growth Mindset

They demonstrate a strong desire for personal and professional growth. They are motivated to expand their skillset, take on new challenges, and pursue developmental opportunities within the organization



Values-Driven

They understand and embody Chartway's values and exhibit an understanding of how leadership development helps them live out our purpose



Team-Oriented

They acknowledge the importance of collaboration by actively contributing to team success, supporting fellow team members, and seeking out diverse perspectives



Resilient

They maintaining a positive attitude in the face of adversity, bouncing back from setbacks with determination, and proactively adapting to change



Self-Aware

They engage in regular self-reflection, seek feedback from others, and demonstrate an understanding of their own emotions, strengths, and weaknesses

Potential > Position Or Performance

1

One of our organizational competencies is “**opening doors for the underrated and overlooked.**” Rather than creating an opportunity that requires nominations in order to participate, interested team members can self-select and express interest.

2

We wanted to **identify potential, not just performance.** Interested team members complete an application which asks about aspirations, leadership experiences, and how they’ve stepped up informally. It helps us gauge alignment with program goals. Leaders of applicants also complete a leadership endorsement.

3

To ensure fairness, we **remove any personally identifiable information** before a cross-functional committee reviews applications. Top candidates are considered well-aligned with the credit union’s purpose and self-motivated to grow and improve.

Program Kickoff

TEAM MEMBER COMMUNICATION

All applicants are notified of their selection status. Those not selected receive developmental feedback and recommended actions to support their continued growth & strengthen future applications. Our goal is to support every applicant's ongoing development, regardless of the selection outcome.

ORGANIZATIONAL ANNOUNCEMENT

Program announcements are shared across multiple internal channels, including our enterprise newsletter, intranet, digital screens at HQ, internal social media, & our all-team meeting. Our goal is to ensure everyone can join in the celebration.

WELCOME LETTER FROM CEO

Each selected participant receives a personalized welcome letter from our CEO delivered to their home. This special recognition celebrates their commitment to leadership development and marks the beginning of their program journey.

WELCOME GIFTS

Participants receive a welcome gift featuring special items, a note from the Learning Team, and their Pillar 1 learning materials. This package is designed to celebrate their selection and provide the resources needed to begin their journey.

TEAMS CHANNELS

Dedicated team channels are established for each cohort to encourage connection, collaboration, & ongoing communication throughout the program. A separate channel is also created for cohort leaders to support alignment, share resources, & enable effective partnership.

KICKOFF MEETINGS

Kickoff meetings are held with each cohort and their leaders to introduce the program, align on expectations, and set the foundation for a successful leadership development experience.



Learning Journey



Inspire Trust

1. Self-Awareness
2. Emotional Intelligence
3. Effective Communication



Empowering Teams

4. Team Building & Collaboration
5. Coaching & Mentoring
6. Inclusive Leadership



Embracing Adaptability

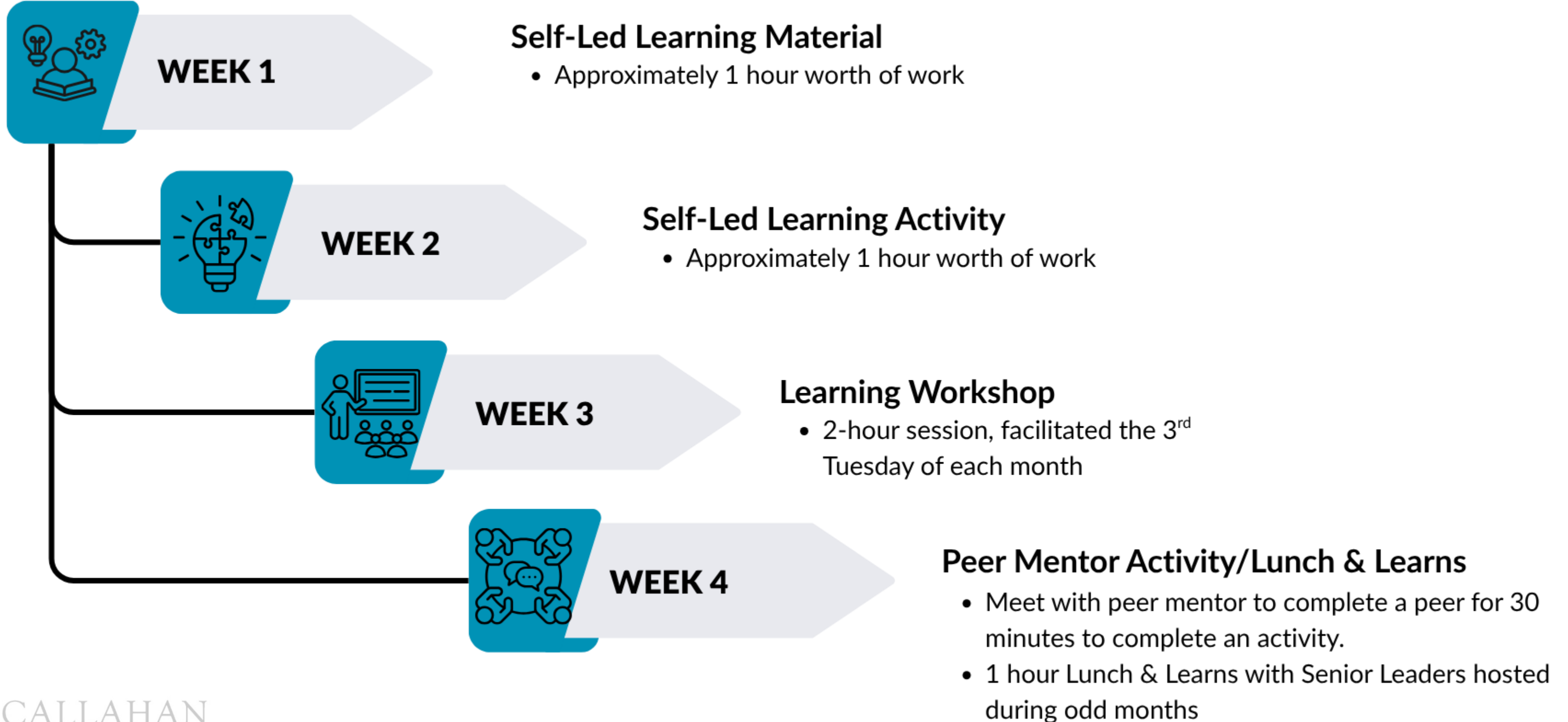
7. Problem Solving Skills
8. Innovation
9. Leading & Embracing Change



Execute Strategy

10. Execute Strategy
11. Project Management
12. Professional Presence & Networking

Inside a Month in the Life



Peer Mentors, Shadow Sessions, & More

- ✓ Book of the Quarter
- ✓ Peer Mentors
- ✓ Leadership Mentors
- ✓ Professional Headshots
- ✓ Resume Review
- ✓ Job Shadowing Opportunities
- ✓ Lunch & Learns with Each Chief Officer
- ✓ Increased Exposure to Internal Processes
- ✓ External Networking Opportunities
- ✓ Milestone Celebrations



Capstone Presentations

Participants share key insights from their leadership journey and demonstrate how they plan to apply their learnings moving forward.

These presentations provide an opportunity to showcase growth and impact with senior leaders & their teams.

Capstones also help participants build confidence & strengthen their presentation skills, often providing their first opportunity to present in a formal setting.



Always Listening & Learning



Program Surveys

Pillar surveys gather timely, actionable feedback from participants and their managers to measure impact, identify opportunities for growth, and continuously shape and improve the program experience.



Capstones

Capstone Presentations provide an opportunity to gather insights from participants on what was most impactful to their growth, helping us evaluate program effectiveness and continuously shape the future learning experience.



Engagement

Our annual engagement survey helps us understand the broader impact of the program across the organization by gathering insights on key engagement metrics.



Lessons Learned

- **How to help participants manage the program's workload** on top of existing responsibilities. We spent a lot of time assessing pace and content.
- Another realization was the **importance of leader support**. We created the program with participants in mind but quickly realized we needed to equip their leaders as well and as a result, a side-by-side leader's guide has been introduced with tools for hosting effective one-on-ones with program attendees.

Advice for Building a Program

- **Tie it to succession and retention.** Anchor the program to a real pipeline gap, not training for its own sake - that is what earns executive sponsorship.
- **Listen & learn** before you build and include others in the process - they'll become your strongest program advocates.
- **Build for flexibility from the start.** Deliver content in stages, revisit pace and priorities each cycle, and adapt cohort size, tools, and topics to fit your organization as it evolves.
- **Blend learning, application, and connection.** Combine self-paced work, workshops, and real-world practice, wrapped in strong operations. (and use others expertise to help get it off the ground quickly)
- **Enable the leaders, not just the participants.** Equip managers with tools from day one - it is the make-or-break factor.
- **Measure.** Instrument the program with desired outcomes and pulse surveys from the start so you can prove impact and keep iterating.



Questions?



Presented by Guest Speaker

Jill Edsall