



2018 AFSA LEADERSHIP DEVELOPMENT PROGRAM

*Invest in the development of
your organization's future leaders*

**University of North Carolina
Chapel Hill, North Carolina
July 14-21, 2018**

BEN ROSEN, Ph.D.

Faculty Director, AFSA Leadership Development Program



The new, fast-paced format allows participants to immerse themselves in cutting edge principles of management and leadership.

It is often said that great leaders read the handwriting on the wall before their competitors even see the wall. Leaders share their visions, build strong coalitions and position their organizations for sustainable success. Accordingly, there can be no greater business investment than the development of future leaders.

The AFSA Education Foundation in partnership with the University of North Carolina's Kenan-Flagler Business School offers an outstanding leadership development opportunity. We are pleased to announce that the AFSA Leadership Development Program will be offered on July 14-21, 2018.

In recent years, we have completely redesigned the management development experience. To accommodate the busy schedules of today's up and coming leaders, the program has been condensed from two weeks to six intensive days. The new, fast-paced format allows participants to immerse themselves in innovative principles of management and leadership through class discussions, case analyses, and computer simulations. Here are some of the highlights of the 2017 Program:

- Learning the responsibilities of leadership, including articulating a vision and communicating the vision with passion and urgency.
- Creating a plan for strategic change and receiving immediate feedback on employee buy-in in the context of a challenging computer simulation.
- Developing an ethical "rule of thumb" for making business decisions quickly and effectively.
- Mastering critical negotiation skills including "principled negotiation", "interest based negotiation," and "win-win" negotiation.
- Building confidence in the ability to make dynamic and persuasive presentations.
- Analyzing strategic decision-making in the context of cases in the financial service industry.
- Experiencing first-hand the dynamics of building trust, collaborating, and creating an effective team.
- Receiving an update on 2018 critical regulatory issues from industry experts.

Beyond the classroom, participants have many opportunities to expand their professional networks, benchmark best practices across the industry, and build lasting personal friendships.

The program takes place at the Paul J. Rizzo Conference Center in Chapel Hill, an unparalleled facility for world-class executive development. Set in a 28 acre wooded environment near the University of North Carolina campus, the state of the art complex is a self-contained learning community. Leading edge instructional technology and expert technical support, and a relaxed retreat setting provide an ideal learning environment for executives. The facility includes a modern residential complex complete with swimming pool, health club, and an elegant dining and social center.

We encourage you to invest in the future leadership of your organization and sponsor your "best and brightest" managers.

Sincerely,

A handwritten signature in black ink that reads "Ben Rosen". The signature is fluid and cursive, written in a professional style.

Ben Rosen, Ph.D.
Faculty Director, AFSA Leadership Development Program

AFSA PROFESSIONAL DEVELOPMENT COMMITTEE

JEFFREY CASEY

Chair, Professional Development Committee
Senior Vice President, Mariner Finance, LLC

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Vice Chair, Professional Development Committee
VP-Managing Director, Learning
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Tidewater Finance Company

NICOLE MASON

Program Manager, Executive Development
UNC Kenan-Flagler Business School

SHARON MOORE

President
Career Success

BEN ROSEN, Ph.D.

Hanes Professor
Kenan-Flagler Business School
University of North Carolina

CHRIS STINEBERT

President & CEO
American Financial Services Association

BILL STUBBS

Vice President &
Chief Human Resources Officer
Regional Management Corp.

MESSAGE FROM THE PROFESSIONAL DEVELOPMENT COMMITTEE

“Financial services is, at its core, a business by and for people, which values effective leadership above all. Our industry needs leaders who are strategic, ethical and understand that it is those they lead who create the most value for our business and customers. Supported by these leadership pillars, the AFSA Leadership Development Program (LDP) challenges attendees with a curriculum which enhances current leadership skills, driving personal and professional growth through participation in interactive, thought provoking sessions. We believe in results and that is what AFSA LDP is all about! If you are looking to take the next step in your career or develop the skills of your leaders, AFSA LDP is where you need to be”

CLASS PRESIDENT’S TESTIMONIAL



“Since the financial crisis of 2008, numerous new laws and regulations have made it necessary for companies in the industry to make major changes in the way they conduct their day-to-day operations. Organizations must be able to anticipate, plan for, and adjust to this ever-changing environment and having a well-trained team of employees is vital for the survival of an organization. For this reason, the AFSA Leadership Development Program should be considered an essential part of your employee’s training.

One of the components that make this program so effective is that the material is presented by a team of extremely talented instructors in a manner that encourages discussion and constantly keeps the participants engaged in the topics being presented. When you have outstanding instructors teaching concepts that include managing and leading people, understanding the importance of developing a strategy, and an understanding of the importance of ethics, it becomes very clear in the early stages of the program that you are being given the tools that will help you guide an organization through a period of change. But how do you take the next step and implement your plan? The thing that distinguished this program from others being offered is that it helps you develop the tools that will allow you to implement change by being a more effectively communicator, becoming a more effective negotiator, and providing you with a better understanding of what must be considered when you implement changes in an organization.

It is important that your organization be prepared for whatever the future may bring. Having employees who have the skills to adjust and implement necessary change is vital to the long-term success of any organization and the AFSA Leadership Development Program at the University of North Carolina offers an excellent way to prepare your employees and your organization for whatever the future may bring.”

GREG SHEALY

2017 Class President
Regional Operations Director
1st Franklin Financial Corporation

AFSA LEADERSHIP DEVELOPMENT PROGRAM

BEN ROSEN

Hanes Professor of Management, Ph.D.,
University of North Carolina,
Kenan-Flagler Business School

MANAGING AND LEADING

Great managers begin by learning to manage themselves effectively. Self-management requires a clear sense of priorities and the discipline to stay focused on those activities that add value to the organization. Beyond self-management, successful managers quickly learn that they cannot do everything themselves. Rather, they must learn to delegate, empower, and build high-performance teams.

While managers are responsible for meeting short-term goals, leaders are expected to be visionaries who see the handwriting on the wall before their competitors even see the wall. Leaders focus on the future, communicate goals with a sense of urgency, shape the culture, and push for change. It is the leader's responsibility to position the organization for long-term success.

Participants will learn to:

- Set priorities and manage time effectively
- Delegate and empower their direct reports
- Build high-performance teams
- Develop and communicate a vision statement
- Help shape a corporate culture
- Position their organizations to gain a competitive advantage

PAUL FRIGA

Professor of Organizational Behavior, Ph.D.,
University of North Carolina,
Kenan-Flagler Business School

STRATEGY ISSUES CASE STUDIES

Strategy demands vigilance, an understanding of the environment, and a view to the future. To manage strategy, think about CLASS – Culture, Leadership, Alignment, Structure, and Systems.

Participants will examine two case studies of firms in the financial services industry and consider the strategic decisions made by top executives and the consequences of these decisions for various stakeholders, including customers, stockholders, employees, and regulators.

KURT GRAY

Associate Professor of Psychology,
University of North Carolina,
Department of Psychology

ETHICS

Managers are selected for executive development because they have demonstrated a great potential for leadership. As they rise within the organizational ranks, one of the inevitable challenges that they will face is the increasingly complex set of decisions that include a mix of management, finance, accounting, marketing, and other issues. Inevitably included within these decisions will be a huge component of ethical issues that test the fundamental principles of the company and the individuals within the company. Moreover, leaders often have to make decisions on the fly, with little time to reflect on ethical nuances.

To meet this challenge, this session will focus on the following points:

- Addressing when an issue becomes one that requires ethical decision-making skills
- Assessing which ethical theories make the most sense for business decision-makers
- Analyzing how one makes ethical business decisions
- Analyzing a real-life business case that carries major ethical concerns
- Developing an ethical “rule of thumb” for making ethical decisions quickly and effectively

HEIDI SCHULTZ

Professor and Director, Management and Corporate Communication, Ph.D.,
University of North Carolina,
Kenan-Flagler Business School

DEVELOPING AND DELIVERING PROFESSIONAL PRESENTATIONS

Leadership requires mastering the art of effective persuasion. Leaders must be able to communicate both within and outside the organization clearly, concisely, and convincingly. Through lecture, discussion, exercises, and practice, this session will help participants refine their presentation skills by covering the following topics:

- Organizing presentations effectively and efficiently
- Designing and integrating PowerPoint slides, notes, and questions into presentations effectively
- Delivering information with confidence

OUTDOOR TEAM-BUILDING EXERCISE

Every manager recognizes the importance of building cohesive, productive, and resilient teams. Key components of team building include excellent communication among members, high levels of trust, norms of collaboration, and dedication to achieving the team's goals. Through a series of challenging outdoor exercises, participants will develop new insights on teamwork and collaboration.

AFSA LEADERSHIP DEVELOPMENT PROGRAM

JESSICA CHRISTIAN

Clinical Associate
Professor of
Organizational Behavior,
University of
North Carolina,
Kenan-Flagler
Business School

NEGOTIATIONS

Most business executives lack confidence as negotiators. When queried, they often indicate a dislike of negotiating because they dislike conflict, hate confrontation, don't think quickly on their feet, and cave too quickly to the other side's demands. This session will address these fears and misgivings with an explanation of what actually works in negotiation and what rarely works. The primary focus will be on learning the techniques of what is often referred to as "principled negotiation," "interest-based negotiation," or simply "win-win" negotiation. We explore how these techniques are usually superior to more attack-oriented negotiation approaches, but we also learn how to deal with those who approach bargaining with a win-lose attitude.

Because negotiation is a skill, rather than simply a body of knowledge, we do a substantial amount of learning by engaging in negotiation exercises and address the following topics:

- Why good negotiators think they are ineffective
- Attributes of good negotiators as shown by studies
- Techniques for principled negotiation, interest-based negotiation, also known as win-win negotiation
- How to open and conduct a negotiation
- Tips and techniques of great negotiators
- Reflections on negotiations conducted during the day's session

BEN ROSEN

Hanes Professor of
Management, Ph.D.,
University of
North Carolina,
Kenan-Flagler
Business School

EXPERIENCE CHANGE SIMULATION

Every executive has been a part of organizational change, both as a leader and as a participant. Yet, many change efforts don't produce the desired effect that those leading the change effort wished for. This common issue has resulted in significant research with practical implications for managers and executives who want to increase the likelihood of the change initiative having lasting results.

This session will draw on both the research and experience of the executives on ineffective and effective strategies for change management and overcoming resistance to change. A key component of this session will be a simulation where participants will work in teams as consultants for a technology company that has declining revenues and profits. Each team's goal is to navigate the change process to enhance the company's chances for improved competitiveness and survival. After the simulation, participants will tie theory to practice, and leave with practical tools and strategies to add to their "management database."

Key concepts include:

- Developing a structured approach to diagnosing, planning, and implementing organizational change
- Analyzing and discussing practical tools to help executives lead change
- Test thinking on managing change, using a change management simulation
- Applying lessons on managing and leading change that apply to each executive's area of responsibility
- Discussing strategies for leading change that draw from both research and experience
- Creating effective strategies to manage resistance to change

CHRIS STINEBERT

President & CEO,
American Financial
Services Association

INDUSTRY UPDATE

Meet AFSA's leader and get up to date on critical regulatory issues affecting the consumer finance industry. You will have an opportunity to ask questions.

AFSA LEADERSHIP DEVELOPMENT SCHEDULE

Saturday July 14	Sunday July 15	Monday July 16	Tuesday July 17	Wednesday July 18	Thursday July 19	Friday July 20	Saturday July 21
Participant Arrivals	Outdoor Team-Building Event at Triangle Training Center	Orientation Managing and Leading: Part one 8:00 – 11:45 Ben Rosen	Strategic Thinking 8:00 – 11:45 Paul Friga	Language of Leadership 8:00 – 11:45 Heidi Schultz	Business Ethics 8:00 – 11:45 Kurt Gray	Leading and Managing Change 8:00 – 11:45 Ben Rosen	Participant Departures
	Lunch	Lunch & Industry Update 11:45 – 1:00	Lunch 11:45 – 12:30	Lunch 11:45 – 12:30	Lunch 11:45 – 12:30	Lunch 11:45 – 12:30	
	Check-in after 3:00 Opening Reception 6:30 – 7:30	Outdoor Team-Building Event at Triangle Training Center 1:00 – 5:00 Ben Rosen	Managing and Leading: Part one 12:30 – 5:00 Paul Friga	Strategic Thinking 12:30 – 5:00 Heidi Schultz	Language of Leadership 12:30 – 5:00 Heidi Schultz	Negotiations 12:30 – 4:30 Jessica Christian	
DuBose	Dinner Free Evening	Dinner DuBose 6:00 – 8:00	Dinner DuBose 6:00 – 8:00	Dinner DuBose 6:00 – 8:00	Dinner Free Evening	Graduation Reception & Dinner 6:30 – 8:30	

GENERAL INFORMATION AND REGISTRATION

ENROLLMENT

Open to individuals associated with financial services, including diversified financial institutions, consumer and sales finance companies, credit card companies, retail companies, auto finance companies, and independently owned and operated finance companies.

CERTIFICATE

Participants who successfully complete the requirements of the program will be awarded a certificate of completion and Continuing Education Units (CEUs). Attendance at graduation on Friday night, July 20 is a mandatory requirement to complete the program.

ARRIVAL/DEPARTURE

Participants should plan to arrive on Saturday, July 14. A reception is planned for Saturday evening. Classes begin on Sunday morning. Departure can be scheduled for Saturday morning, July 21.

DRESS/CLIMATE

Business-casual attire such as sports shirts and long pants is appropriate for class sessions. Business attire is appropriate for the final banquet and graduation ceremony on Friday evening. Athletic wear is necessary for the outdoor team-building exercises. Daytime temperature can range from the mid 80s-90s with moderate humidity. Evening temperature is in the mid-80s to 90s.

AIRPORT

Raleigh/Durham International Airport is the nearest airport to Chapel Hill. Transportation to the Rizzo Center is available by various services including RDU taxi outside of the baggage claim area at the airport. Call 919-840-7277 or book online at rdutaxiinc.com. Rates from the airport to Chapel Hill are approximately \$40 (one-way). Rental car companies are located at the airport as well. The airport is 25-35 minutes from the Rizzo Conference Center depending on traffic. However, please allow up to one-hour travel time.

ACCOMMODATIONS

Participants will be staying at the Paul J. Rizzo Conference Center at Meadowmont. The center, set in a 28-acre wooded environment, provides an ideal setting for learning. The state-of-the-art facility is comprised of three separate buildings—Loudermilk Hall contains the classrooms; McLean Hall offers 120 guest rooms, pantries with complimentary beverages and snacks, three seminar rooms, study rooms with telecommunications ports, business center, Schaffer Kenan Lounge with daily food service, a full health club, and swimming pool; and DuBose House, a Georgian Revival house, serves as a social center.

KENAN-FLAGLER BUSINESS SCHOOL

In early June, UNC Executive Education will email you a password and the link to access course reading materials and logistics.

CANCELLATION POLICY

Because participants will be required to read articles, books, and case studies in advance, cancellations must be submitted in writing and are subject to the following policy:

- Cancellation of enrollment or substitutions will be accepted on or before June 15, 2018; a full refund will be issued.
- No refunds will be made after June 15, 2018; substitutions will be accepted.

PROGRAM FEE: \$7,800 (FEE MUST BE PAID IN FULL PRIOR TO BEGINNING OF PROGRAM)

The fee includes all instructional materials, classroom facilities, housing for seven nights, transportation to program activities, reception on Saturday with light hors d'oeuvres, evening dinners on Monday, Tuesday, Wednesday, and Friday banquet and breakfast, lunch and continuous break service each day.

REGISTRATION

ONLINE REGISTRATION:

<http://www.afsaef.org/Management-Development-Programs/Leadership-Development-Registration>

REGISTRATION DEADLINE: JUNE 15, 2018

REGISTRANT INFORMATION

(Please print or type)

Name _____	_____	_____	_____
_____	Last	First	Badge Nickname
_____	_____	_____	_____
Position/Title	_____	_____	Company Name
_____	_____	_____	_____
Business Address	_____	City/State	Zip
_____	_____	_____	_____
Phone	_____	E-mail	_____

EDUCATION

_____	_____
College or University (if applicable, but not required)	Degree Obtained

BUSINESS EXPERIENCE

List your experience in the financial field (list most recent position first) and briefly outline your specific job responsibilities.

COMPANY INFORMATION

Length of time in current position _____ Length of time with company _____ No. of personnel in company _____
Number of your direct reports _____ Number of your total reports _____
Total Company Assets \$ _____ Consumer Credit Outstanding \$ _____

Registration and attendance at, or participation in, AFSA meetings constitutes an agreement by the registrant to the use and distribution (both now and in the future) of the attendee's image or voice in photographs, videotapes, electronic reproductions, and audiotapes of such events and activities by AFSA.

APPLICATION MUST BE SIGNED BY YOUR SUPERVISOR OR A DESIGNATED COMPANY OFFICIAL

_____	_____	_____	_____
Name	Title	Company	_____
_____	_____	_____	_____
Address	City/State	Zip	E-mail
_____	_____	_____	_____
Signature of Supervisor/Company Official	Date	Signature of Applicant	Date

PROGRAM FEE: \$7,800 Enclosed Please invoice Received by AFSAEF

SEND COMPLETED APPLICATION AND PAYMENT TO:

Rhonda Ashburn
AFSA Education Foundation
919 Eighteenth Street, NW, Suite 300
Washington, DC 20006-5517

Phone: 202-466-8611
Email: mdp@afsamail.org
Website: www.afsaef.org



AFSA EDUCATION
FOUNDATION

Brightening Your Financial Horizon

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