



2022 AFSA LEADERSHIP DEVELOPMENT PROGRAM

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

**University of North Carolina
Chapel Hill, North Carolina
August 6-13, 2022**

HEATHER FREELAND

Faculty Director, AFSA Leadership Development Program



Over the past two years, leaders have led, managed, and communicated at a time when the only certainty seemed to be uncertainty. Leaders have experienced a global pandemic along with social, economic, and political unrest creating situations that they have never experienced or prepared for. To say the least, it has been a challenging time to be a leader in business. Now and in the future, it's critical for leaders to have the skills and confidence to lead through the uncertainty with clarity, direction, authenticity, and empathy and the 2022 AFSA Leadership Development Program has been designed with these skills and capabilities top of mind.

The immersive leadership development experience will focus on business and leadership excellence with six days of learning including in-depth class discussions, case analyses, and simulations all led by award-winning faculty and industry experts. Specifically, leaders will delve into:

- Learning the responsibilities of leadership, how to manage yourself more effectively, and adjust your leadership style to changing situations
- Exploring diversity, equity, and inclusion and how to utilize the power of different viewpoints to build trust and enhance team performance
- Creating a plan for strategic change that focuses on not only implementing change but doing it better and faster with employee buy-in
- Analyzing how strategies get created and executed in the context of a financial services case study
- Mastering critical negotiation skills and understanding the role of gender in negotiating and collaborations
- Mastering how to drive execution with effective decision making, collaboration, and influence

Throughout the week, leaders will accumulate tools that allow them to navigate and thrive in today's complex and uncertain environment. The focus is on learning and, even more critically, the application to real work situations. Beyond the classroom, leaders have many opportunities to expand their professional network and learn from one another.

The program takes place August 6-13, 2022, at the Paul J. Rizzo Conference Center in Chapel Hill, an unparalleled facility for world-class leader and 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 a relaxed retreat setting provide an ideal learning environment. The facility includes a modern residential complex complete with swimming pool, fitness center, and an elegant dining and social center.

We look forward to meeting you and helping you to prepare for the future, developing the skills to help you and your organization thrive.

Sincerely,

A handwritten signature in black ink that reads "Heather Freeland".

Heather Freeland
Faculty Director, AFSA Leadership Development Program

AFSA LEADERSHIP DEVELOPMENT PROGRAM STEERING COMMITTEE

JEFFREY CASEY

Chair, Leadership Development Program
Steering Committee
Senior Vice President, Learning & Development
Mariner Finance, LLC

RHONDA ASHBURN

Staff Liaison
Executive Director
AFSA Education Foundation

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University of North Carolina Executive Development

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Flagship Credit Acceptance

BILL HIMPLER

President & Chief Executive Officer
American Financial Services Association

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Chief Operating Officer
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Regional Management Corporation

JEREMIAH WHEELER

President, DRN
MVTRAC

DR. SVETLANA YEDRESHTEYN

Head of Organizational Development and Learning
OneMain Financial

MESSAGE FROM THE LEADERSHIP DEVELOPMENT PROGRAM STEERING 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



“I was excited when I heard the news that my company, OneMain Financial, selected me to attend the 2021 AFSA Leadership Program. Having the benefit of hearing about the program from other leaders, I knew I was in store for something special.

The program was described as an experiential learning event, and it lived up to that hype! The program included topics all leaders need such as Management and Self

Awareness, Leading and Managing in an Era of Uncertainty, Strategic Thinking, Negotiations and Gender, and Leading and Managing Change.

If you think you are stepping back into college and attending lecture-style training, you will be disappointed. Each day, the professor challenged us during small group activities and collaborative discussions that almost always led to a healthy debate. The material is structured to evoke discussion inside and outside of class as you tackle some of today’s common challenges that face most companies.

Regardless of your leadership tenure, another benefit of the AFSA Leadership Program is building your network. The class was diverse with varying levels of experience within the consumer lending industry. The group was a mix of customer-facing employees, back-end operations folks, and people in marketing, finance and training positions. The diversity made team exercises and collaboration activities extra beneficial — we had so many different points of view involved in our discussions. Equally important, we left the program with a network that included experts outside of our own companies.

As great as the week was, the biggest success factor for any training program is transferring the information and skills learned back to the job. When I returned to work, I was able to immediately start sharing information that I found most beneficial with my team and my peers, and I put my learnings into action. My team loved the communication style exercise!

There isn’t a week that passes that I’m not looking up something within the material or reaching out to a classmate, either within my own organization or someone I met during the program. This week-long investment in your emerging Leadership Team will pay for itself. I encourage all AFSA Members to invest in their leaders by leveraging this program.”

CINDY CROWLEY

2021 Class President
Associate Director Training Development
OneMain Financial

AFSA LEADERSHIP DEVELOPMENT PROGRAM

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 exercises, participants will share their leadership journeys and explore methods to expand their effectiveness through activities and conversations. The leadership skills of vision, understanding, clarity, and agility are reinforced.

MABEL MIGUEL

Professor of Organizational Behavior and Director, Global Business Center, University of North Carolina, Kenan-Flagler Business School

DEVELOPING LEADERSHIP & MANAGEMENT SELF-AWARENESS

Great managers and leaders continuously sharpen the skills needed for both personal and professional growth. Winning in the future requires leaders to be masters of the “human skills” of team dynamics while effectively leveraging the benefits of a dynamic workforce.

To be most effective, managers and leaders must learn first how to manage themselves effectively. Through activities and interactive discussion, participants will explore the difference between management and leadership, when to act as a leader and when to act as a manager. Additionally, great managers and leaders must develop an understanding of personal tendencies when collecting information and making decisions, and how these tendencies evolve as your career develops. Using the I-OPT Advanced Leadership assessment, participants learn their dominant leadership style, natural tendencies to team up with ‘like-minded’ people, and the benefits and pitfalls of teams with similar strengths. Participants will develop greater self-awareness of their preferences and learn how to utilize the power of different viewpoints to build trust and enhance team performance.

Participants will learn to:

- Understand self-awareness, self-disclosure, and feedback
- Build awareness of personal information processing styles and the role they play
- Reflect on what good leadership and management looks like
- Describe yourself and others in terms of personal style, and selected leadership and management skills
- Articulate how this self- and other-awareness builds inclusion and facilitates effective teamwork and leadership

BILL HIMPLER

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.

ANGEL NIX

President & CEO, The National Institute of Leadership & Organizational Development, Affiliate faculty, University of North Carolina, Kenan-Flagler Business School

INCLUSIVE LEADERSHIP: EXPLORING DIVERSITY, EQUITY, AND INCLUSION

Diversity and Inclusion is a business imperative for organizations all over the globe. However, there remains widespread confusion around what inclusion is and how to create it in everyday workplace situations. In short, most organizations have already made the case for inclusion, but few have found ways to equip their people with the skills they need to be inclusive leaders. This session will provide an immersive and fully interactive experience, complete with the concrete tools senior leaders need to create an environment where the benefits of inclusion can be realized. Participants will bring their experiences into the classroom so they can critically analyze and build their understanding of how they can better create an environment that drives business performance by fostering inclusion.

SREEDHARI DESAI

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

BUSINESS 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
- Understanding sources of implicit bias and how to overcome them to create inclusive workplaces

AFSA LEADERSHIP DEVELOPMENT PROGRAM

SREEDHARI DESAI

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

NEGOTIATIONS AND GENDER

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. We will also explore whether women negotiate differently than men.

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
- The role of gender in negotiations and collaborations
- Tips and techniques of great negotiators

PAUL FRIGA

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

STRATEGIC THINKING

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.

MATT PEARSALL, Ph.D.

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

LEADING AND MANAGING CHANGE: 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

AFSA C-SUITE LEADERS SHARE THEIR PERSPECTIVE

Hear first-hand from industry leaders regarding their professional experiences and challenges they have faced during their careers.

AFSA LEADERSHIP DEVELOPMENT SCHEDULE

Saturday 8/6/22	Sunday 8/7/22	Monday 8/8/22	Tuesday 8/9/22	Wednesday 8/10/22	Thursday 8/11/22	Friday 8/12/22	Saturday 8/13/22
Participant Arrivals	Teambuilding Event Triangle Training Center 10:00 – 12:00 Triangle Training Center	Orientation Developing Leadership & Management Self-Awareness 8:00 – 11:45 Mabel Miguel	Strategic Thinking 8:00 – 11:45 Paul Friga	Business Ethics 8:00 – 11:45 Sreedhari Desai	Inclusive Leadership 8:00 – 11:45 Angel Nix	Leading and Managing Change 8:00 – 11:45 Matt Pearsall	Participant Departures
Check in after 3:00	Lunch 12:00 – 1:00	Group Photo/ Lunch & Industry Update 11:45 – 1:00 Meadowmont Grill	Lunch 11:45 – 12:30 DuBose House	Lunch 11:45 – 12:30 DuBose House	Lunch 11:45 – 12:30 DuBose House	Lunch 11:45 – 12:15 DuBose House	
	Opening Reception Poolside Courtyard, McLean Hall 6:30 – 7:30	Teambuilding Event Triangle Training Center 1:00 – 3:00 Triangle Training Center	Developing Leadership & Management Self-Awareness 1:00 – 5:00 Mabel Miguel	Strategic Thinking 12:30 – 5:00 Paul Friga	Negotiations & Gender 12:30 – 5:00 Sreedhari Desai	Inclusive Leadership 12:30 – 5:00 Angel Nix	
	Dinner Free Evening	Dinner DuBose House 6:00 – 8:00	Dinner DuBose House 6:00 – 8:00	Dinner DuBose House 6:00 – 8:00	Dinner DuBose House 6:00 – 8:00	Dinner Free Evening	Graduation Reception & Dinner Magnolia C 6:30 – 8:30

Excerpts from a Student's Letter to his Company Leadership



I hope this communication finds you all well. I want to take a few minutes and let you know how appreciative I am for the opportunity to represent Credit Central at the AFSA Leadership Development Program held at the University of North Carolina. To say it was an amazing experience for me is an understatement. Based on the experience in the classroom, the future in finance is bright!

The class pushes you out of your comfort zone FAST! Kind of like our industry if we think about it. Something can be okay today, and tomorrow you're putting out fires that you didn't anticipate.

As far as the classroom takeaways, I literally have 75% of a legal pad consumed with notes. I took away something from each day from the teambuilding exercise at the beginning of the week which led to relationships blossoming and friendships forming to the last day which was incredible. It was about change from a leader's role. We got to simulate this in a group setting and tried to save a company from bankruptcy. I am happy to report, my group saved the company! We were given access to the simulation for 90 days. So I plan to utilize that with my team.

In closing, on the c-suite panel, they suggested to volunteer for committees, pilot programs, and always try to be involved. I would love to help improve Credit Central in any way I can if called upon. Thank you again. It was an amazing experience and I'm very appreciative to all of you.

JONATHON BAKER
Eastern TN Supervisor
Credit Central, LLC

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. An orientation webinar will be held in July for those who have enrolled.

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, August 12 is a requirement to complete the program.

ARRIVAL/DEPARTURE

Participants should plan to arrive on Saturday, August 6. A reception is planned for Saturday evening. If you will be late due to travel challenges please notify program staff. An outdoor team building event is held on Sunday morning. Classes run Monday through Friday. Departure can be scheduled for Saturday morning, August 13.

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 temperatures can range from the high 80s to 90s. Evening temperature is in the mid-60s to 70s.

AIRPORT

Raleigh-Durham International Airport (RDU) is the nearest airport to Chapel Hill. Transportation to the Rizzo Center is available by various services at the airport and reservations are encouraged. Taxi 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. Shared ride services are available outside bag claim in each terminal in the brown limo zones.

ACCOMMODATIONS

Participants will be staying at the Paul J. Rizzo Conference Center at Meadowmont located at 150 Dubose Home Ln, Chapel Hill, NC 27517. 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 July, UNC Executive Education will email you a password and the link to access course reading materials and logistics. It is highly recommended to read the pre-reading materials before classes begin. Additionally, we recommend that participants be prepared to leave their other work at home so that they can get the most from this leadership development experience. Supervisors of participants are encouraged to help in this arena thereby providing a high return on investment from the company's perspective. In addition to orientation sessions, supervisors should also plan to meet after the event and discuss ways of benefiting from the program. Previous participants can be excellent group leaders and mentors for returning company attendees.

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 July 8, 2022; a full refund will be issued.
- No refunds will be made after July 8, 2022; 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:

<https://afsaef.org/Management-Development-Programs/Leadership-Development>

REGISTRATION DEADLINE: JULY 8, 2022

REGISTRANT INFORMATION

(Please print or type)

Name _____
First Last Badge Nickname

Position/Title _____ Company Name _____

Business Address _____ City/State _____ Zip _____

Cell Phone _____ E-mail _____

Plases indicate if you plan to drive or fly. (Check one)

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 _____

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 and the AFSA Education Foundation.

If you require special assistance or have specific dietary needs please provide details.

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 AFSA Education

SEND COMPLETED APPLICATION AND PAYMENT TO:

Rhonda Ashburn
AFSA Education Foundation
919 Eighteenth Street, NW, Suite 300
Washington, DC 20006-5531

Phone: 202-466-8611 (office)
703-901-9459 (mobile)
Email: rashburn@afsamail.org
Website: www.afsaef.org



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