

2024 AFSA LEADERSHIP DEVELOPMENT PROGRAM

Invest in the development of your organization's future leaders



University of North Carolina | Chapel Hill, North Carolina
August 17-24, 2024



ELLEN CONWAY

Faculty Director, AFSA Leadership Development Program

Unlock Your Leadership Potential: Join the 2024 AFSA Leadership Development Program for Financial Services Executives

It is with great pleasure that I invite you to the 2024 AFSA Leadership Development Program tailored specifically for leaders in the financial industry. This program will equip you with practical strategies and adaptable leadership skills to confidently navigate the dynamic financial landscape and drive growth in an ever-changing business environment.

The financial industry is undergoing rapid transformations, necessitating leaders who possess a unique blend of strategic vision, adaptability, empathy, and innovation. **This immersive leadership experience is designed to address these challenges head-on and with real-world application, offering a comprehensive curriculum crafted by award-winning faculty and industry experts.** By participating in this program, you will gain invaluable insights and skills that are directly applicable to your role, enabling you to lead your team with confidence and foresight.

Key Program Highlights:

Elevate Your Leadership: Unlock the art of effective leadership through self-management techniques that enable you to adapt your leadership style to navigate ever-evolving business challenges.

Strategic Planning for Business Success: Acquire practical skills to create effective strategies and carry them out with precision, boosting your organization's success to new levels.

Building Trust and High-performing Teams: Exploring diversity, equity, and inclusion and how to utilize the power of different viewpoints to foster a collaborative and results-driven work environment.

Change Management Expertise: Acquire the skills needed to lead your organization through transformative periods, ensuring adaptability and resilience in the face of change.

Communicating and Presenting with Impact: Learn to create impactful messages, deliver compelling presentations, and hone your communication techniques to effectively influence your audience.

Networking Opportunities: Connect with like-minded executives and industry experts, fostering meaningful relationships that can be leveraged for future collaborations and business growth.

By investing in your leadership development, you are not only enhancing your personal skill set but also positioning your organization for sustained growth and success. Our commitment to excellence, combined with a focus on the unique challenges faced by the financial services industry, sets the AFSA Leadership Development Program apart as the premier choice for leaders like yourself.

The program takes place August 17-24, 2024, 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.

I invite you to consider this opportunity to elevate your leadership skills and, in turn, drive unparalleled growth within your organization.

40 YEARS OF LEADERSHIP

As we celebrate 40 years of the AFSA Leadership Development Program, we want to thank the University of North Carolina Executive Development organization for partnering with us on the longest standing partnership in its history. The program has evolved with the times having at one point lasted two weeks, changing topics as the times called for them, and weathering unique circumstances like the pandemic.

AFSA company execs frequently tout the program's value commenting on how they still reference their program notebooks and keep in touch with their cohorts. Instructors are top-notch, award-winning educators specializing in their areas of expertise. Some have instructed decades and remain loyal and supportive of the program. Others are newer to the program but equally excited to be a part and offer their expertise.

Members of the Leadership Development Program Steering Committee are excited to be celebrating the 40th anniversary. The steering committee members work hard to ensure that the curriculum challenges attendees and enhances their leadership skills driving personal and professional growth year after year. These company leaders are budgeting for participants to attend and making it possible for students to fully focus on the sessions while putting their work responsibilities on hold.

To celebrate 40 years of leadership, previous participants are invited to attend this year's graduation on the evening of August 23 at Rizzo Conference Center in Chapel Hill, North Carolina. Reach out to Rhonda Ashburn, AFSA Education Foundation Executive Director, via email at rashburn@afsamail.org to learn more.

VISION:

Provide premier financial services leadership development program to educate today's managers with the skills to become tomorrow's leaders

MISSION:

Empower managers to lead high performing teams who can advocate for access to affordable credit products through leadership development training course and networking

AFSA LEADERSHIP DEVELOPMENT PROGRAM STEERING COMMITTEE

ROCHELLE McCLANAHAN

Chair, Leadership Development
Program Steering Committee
Chief Financial Officer
Brundage Management
Company

RHONDA ASHBURN

Staff Liaison
Executive Director
AFSA Education Foundation

SAL CALVIO

Vice President, Talent
Management
Security Finance Corporation of
Spartanburg

RONDA CEPEDA

Director of Auto Lending Sales
Point Predictive

ELLEN CONWAY

Program Director
University of North Carolina
Executive Development

BILLY FULLER

Senior Vice President
1st Franklin Financial
Corporation

JENNIFER BARRETT GAUNA

Chief Administrative Officer
Flagship Credit Acceptance

BILL HIMPLER

President & Chief Executive
Officer
American Financial Services
Association

GARY McQUAIN

Chief Operating Officer
1st Franklin Financial Corporation

SHARON MOORE

President
Career Success

BRAD NOEL

Executive Vice President –
Director of Branch Operations
Republic Finance, LLC

SHUNDA ROBINSON

Senior Vice President of
Diversity, Equity & Inclusion
GM Financial

DAN WALTERS

Chief Executive Officer
Credit Central, LLC

MITCH WETTSCHURACK

Vice President, Operations
Support and Development
Regional Management
Corporation

JEREMIAH WHEELER

President
DRN | MVTRAC

KELLY K. WIGHT

Senior Program Manager of
Organizational Development
and Learning
OneMain Financial

JEFF WILLIAMSON

VP, Consumer Finance Director
Anderson Brothers Bank

CLASS PRESIDENT'S TESTIMONIAL



BRUCE BOYD, CPTM
2023 Class President
Director of Talent Development
Brundage Management

As class president of the 2023 AFSA Leadership Development Program, I am thrilled to share the invaluable benefits of attending this transformative experience. This program is nothing short of exceptional, and it equips you with the skills and knowledge that are indispensable for effective leadership in today's dynamic business landscape.

Our company has participated in this program for many years, and I had always heard about the impact this program had on the participants who attended. When I received an invitation to attend from my boss, I was thrilled for the opportunity.

I was looking forward to learning side by side with other members of the consumer finance industry as we all worked to build our leadership skills. It was exciting to be in a program with the future leaders of this industry.

As the program start approached, I had a mixture of excitement and nervousness. However, from the time I arrived at the UNC facility, the nervousness faded, and the excitement grew. Fast forward to the end of the week and I realized that this experience provided me with invaluable opportunities that don't come along often.

The event started with a reception, and you could tell that most everyone attending had a little apprehension about the week. The first activity of the week completely changed that and set the tone for a great week. That day was spent at the Triangle Training Center, where as a group we overcame obstacles and conquered fears through team building exercises. These activities brought the group together and established friendships that have continued past the program.

The classroom portion started on Monday and all I could say was "WOW!" The professors were amazing and understood our industry and the challenges that we face. It was not a week of sit still while we instill, but rather it was a perfect combination of learning, discussing, and putting into action through group projects. The materials curated by the AFSA Leadership Development Program Steering Committee were spot on and addressed the current needs of our industry.

Throughout the week we learned how to create a Strategic Plan, gained insight into who we are as leaders and our leadership styles, and how to incorporate our styles and the goal of our strategic plans to become better negotiators. We finished out the week discussing how to be more inclusive leaders and closed out with how as leaders we can better manage change in the business.

For me the program's standout feature was its comprehensive approach to leadership development. It challenged me to delve into the core responsibilities of leadership and take a deep look at how to manage myself more effectively.

If I may offer one last thought on the program. **The AFSA Leadership Development Program is a game-changer for anyone aspiring to excel in leadership.** It provides a comprehensive toolkit, equips you with practical skills, and empowers you to become a more effective and influential leader. I wholeheartedly recommend this program to anyone looking to enhance their leadership capabilities and make a significant impact in their organization.

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.

DEVELOPING LEADERSHIP & MANAGEMENT SELF-AWARENESS

MABEL MIGUEL, PhD

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

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

INDUSTRY UPDATE

BILL HIMPLER

President & CEO, American Financial Services Association

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.

“ 100% of students responding to the survey following the program indicated they feel that the investment in attending the program has had a positive impact on their company/business. ”

AFSA LEADERSHIP DEVELOPMENT PROGRAM

STRATEGIC THINKING

PAUL FRIGA, PhD

Clinical Associate Professor of Strategy & Entrepreneurship, University of North Carolina, Kenan-Flagler Business School

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.

STRATEGIC LEADERSHIP: EXECUTION THROUGH PEOPLE

DAVID ROBERTS

Professor of the Practice of Marketing, University of North Carolina, Kenan-Flagler Business School

One definition of leadership is “The achievement of results through people”. This interactive session will introduce and discuss the challenges associated with executing your chosen strategy through others. We will delve into a research-based solution for achieving consistent and comprehensive support from individuals to execute the strategy and participants will learn practical and actionable steps to employ.

Topics discussed in this session include:

- The problem with strategy (execution)
- The role of the strategic leader
- Barriers to implementation – self
- Barriers to implementation – others
- The critical skills needed to influence others

INCLUSIVE LEADERSHIP: EXPLORING DIVERSITY, EQUITY, AND INCLUSION

ANGEL SWINDELL NIX, MA, BCC

Affiliate Faculty, UNC Executive Development

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.

AFSA C-SUITE LEADERS SHARE THEIR PERSPECTIVES

Hear first-hand from industry leaders regarding their professional experiences and challenges they have faced as we celebrate 40 years of leadership development.

AFSA LEADERSHIP DEVELOPMENT PROGRAM

LEADING AND MANAGING CHANGE

BERKLEY BAKER, DBA, MBA

Affiliate Faculty, UNC Executive Development

For an organization to thrive, change must occur. But change is a disruptor and can be viewed as a potential threat, creating an environment of resistance. Each of us has been a part of a significant business change, both as a leader and as a participant, often seeing that many of the change efforts don't produce the desired effect. This is a common issue and has resulted in significant research with practical implications for managers and leaders who want to increase the likelihood of the change initiative having lasting results. This session will build on the previous' days learnings related to leading and managing, collaboration and influence, strategy, and equity and inclusion as participants explore how to achieve better results with less resistance. The workshop draws on both research and participants' experience of ineffective and effective strategies for change management and overcoming resistance to change. The leaders will tie theory to application and leave with practical tools and strategies for successfully leading local or enterprise change efforts.

Key concepts include:

- Developing a structured approach to diagnosing, planning, and implementing change
- Analyzing and discussing practical tools to help leaders lead change
- Creating effective strategies to manage resistance to change
- Applying lessons on managing and leading change to each participant's area of responsibility

COMMUNICATING FOR IMPACT: STORYTELLING AND MULTIDIRECTIONAL COMMUNICATION

MELISSA GEIL, PhD

Clinical Associate Professor, Management and Corporate Communication, University of North Carolina, Kenan-Flagler Business School

This session will employ experiential learning techniques to enable participants to harness the power of storytelling to influence and inform key stakeholders. Additionally, the session will focus on multidirectional communication strategies designed to help participants connect more impactfully with targeted audiences.

Communicating for Impact learning objectives:

- Develop impactful storytelling skills to leverage when talking with key stakeholders
- Demonstrate product impact and significance using targeted messaging
- Cultivate interpersonal and communication skills that can be applied and adapted multi-directionally

LEADERSHIP DEVELOPMENT PROGRAM THROUGH THE YEARS



AFSA LEADERSHIP DEVELOPMENT SCHEDULE

Aug. 17, 2024	Aug. 18, 2024	Aug. 19, 2024	Aug. 20, 2024	Aug. 21, 2024	Aug. 22, 2024	Aug. 23, 2024	Aug. 24, 2024
Participant Arrivals	Teambuilding Event <i>Triangle Training Center (TTC)</i> 10:00 – 12:00 PM (Bus departs at 9:30 AM, McLean Main Lobby)	Welcome & Overview 8:00 AM	Insights & Application 8:00 AM	Insights & Application 8:00 AM	Insights & Application 8:00 AM	Insights & Application 8:00 AM	Participant Departures
		Leadership & Management 8:20 AM – 11:45 AM <i>Mabel Miguel</i>	Strategic Thinking 8:15 AM – 12:00 PM <i>Paul Friga</i>	Inclusive Leadership 8:15 AM – 12:00 PM <i>Angel Nix</i>	Leading and Managing Change 8:15 AM – 12:00 PM <i>Berkley Baker</i>	Communicating for Impact: Storytelling and Multidirectional Communication 8:15 AM – 12:00 PM <i>Melissa Geil</i>	
	Lunch 12:00 – 1:00 PM onsite at TTC	Lunch & Industry Update 11:45 AM – 1:00 PM <i>DuBose Home</i>	Lunch & Group Photo 12:00 – 12:45 PM <i>DuBose Home</i>	Lunch 12:00 – 12:45 PM <i>DuBose Home</i>	Lunch 12:00 – 12:45 PM <i>DuBose Home</i>	Lunch 12:00 – 12:45 PM <i>DuBose Home</i>	
	Teambuilding Event Triangle Training Center 1:00 – 3:00 PM <i>Triangle Training Center</i> (Bus departs at 3:15 PM)	Leadership & Management 1:00 – 4:45 PM <i>Mabel Miguel</i> Closing & Evals 4:45 – 5:00 PM	Executing Strategy Through People 12:45 – 4:45 PM <i>David Roberts</i> Closing & Evals 4:45 – 5:00 PM	Inclusive Leadership 12:45 – 4:45 PM <i>Angel Nix</i> Closing & Evals 4:45 – 5:00 PM	Leading and Managing Change 12:45 – 4:45 PM <i>Berkley Baker</i> Closing & Evals 4:45 – 5:00 PM	Communicating for Impact: Storytelling and Multidirectional Communication 12:45 – 3:00 PM <i>Melissa Geil</i> AFSA LDP 40th Anniversary C-Suite Leaders Panel 3:00 – 4:00 PM	
Check-in after 3:00 PM						Steering Committee Meeting 4:15 – 5:15 PM	
Opening Reception McLean Hall 6:30 PM	Dinner on Own	Dinner at DuBose Home	Dinner at DuBose Home	Dinner in Chapel Hill	Dinner on Own	Graduation Reception – 6:30 PM Dinner – 7:00 PM	

Key Takeaways from 2023 Leadership Development Program Students

“

I was able to identify information from each session that I was immediately able to use.

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“

I have utilized the multiple aspects of the strategic planning process since returning from the program. The SWOT analysis was particularly useful when implemented. I look forward to utilizing aspects of the leadership and personality profiles moving forward as well.

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“

I believe that the aspects of the program that I have been able to implement have resulted in increased buy in from the employees that I supervise. I anticipate that this buy-in will result in improved results moving forward.

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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 prior to the program for those who have enrolled. This event is not meant to facilitate recruitment or sales opportunities.

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 23 is a requirement to complete the program.

SUPERVISOR'S GUIDE

For supervisors of participants in the AFSA Leadership Development Program, a guide is provided which includes key themes and questions company representatives can ask participants to understand how they are using the tools and resources from the program to improve their results, develop their team, and support their organizations.

ARRIVAL/DEPARTURE

Participants should plan to arrive on Saturday, August 17. 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 being held on Sunday morning. Classes run Monday through Friday. Departure can be scheduled for Saturday morning, August 24.

DRESS/CLIMATE

Business-casual attire such as blouses, 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. Typically this time of year, daytime temperatures are in the 80's and evening temperatures are in the 60's.

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. 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 also available outside baggage 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 is a Hyatt hotel and 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.



Rizzo single guest room

KENAN-FLAGLER BUSINESS SCHOOL

Weeks prior, UNC Executive Education will email students 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 17, 2024; a full refund will be issued.
- No refunds will be made after July 17, 2024; substitutions will be accepted.

REGISTRATION

FILLABLE ONLINE REGISTRATION AVAILABLE AT:
www.afsaef.org/management-development-programs/leadership-development-program

PROGRAM FEE: ☐ AFSA Member – \$8,925

☐ Non-member – \$10,265

☐ Enclosed

☐ Please invoice

☐ Received by AFSA Education Foundation

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/40 Years of Leadership reception and breakfast, lunch, and continuous break service each day.

REGISTRATION DEADLINE: JULY 11, 2024

REGISTRANT INFORMATION *(Please print or type)*

Name _____
☐ Mr. ☐ Mrs. ☐ Ms. First Last Badge Nickname

Position/Title Company Name

Business Address City/State Zip

Cell Phone E-mail

Please 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/Phone
Signature of Supervisor/Company Official	Date	Signature of Applicant	Date

SEND COMPLETED APPLICATION AND PAYMENT TO AFSA EDUCATION FOUNDATION:

AFSA Education Foundation
Attention: Rhonda Ashburn
1750 H Street, NW, Suite 650
Washington, DC 20006

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



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Brightening Your Financial Horizon

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