ASSOCIATION OF FINANCIAL MUTUALS

DEVELOPMENT PROGRAMMES 2022

Equipping the future of the mutual sector
TABLE OF CONTENTS

01 INTRODUCTION
02 MUTUAL LEADERSHIP DEVELOPMENT PROGRAMME
03 STEPPING UP DEVELOPMENT PROGRAMME
04 MASTERS IN STRATEGIC LEADERSHIP
05 NEXT STEPS
At the end of 2021, we surveyed members to help inform views on the type of development training AFM members are looking for. Around half of organisations indicated they would put forward one or more candidates for 2022 programmes.

As in previous years, we are launching two programmes this year:

- 'Mutual Leadership' is designed to appeal to busy managers and emerging leaders in AFM member organisations. It is a brand new programme, but builds on a well-tested formula operated across the mutual sector globally, via our international sister, ICMIF. The mix of face-to-face and online experiences, and running sessions alongside the AFM conference, maximise the opportunities to put training into practice.

- The 'Stepping Up' programme is back by popular demand, and is targeted at new managers and supervisors, or those facing a big step change in their responsibilities. The six full-day events will move round the country, and help build enduring networks that will offer support for the long term.

In addition, AFM Members are able to enrol for the Masters’ degree in Strategic Leadership, an award-winning venture between AFM, the Building Societies Association, and the School of Business and Economics at Loughborough University.

Read on for more information and how to get involved.
MUTUAL LEADERSHIP DEVELOPMENT PROGRAMME

Overview

A series of six development sessions, delivered as a combination of in-person and online meetings, targeted at new and emerging leaders, to enable them to:

- Learn the essential frameworks, mental models & tools for mutual leadership in a complex world.
- Undertake peer to peer personalisation of learning and collaboration that will translate insights into near-term value.
- Be part of a wider network of peers who develop long-term mutual support and collaboration.

Who should attend?

More experienced managers and future leaders of AFM Member organisations who are increasingly leading others (formally or informally) and tackling complex problems.

Cost per delegate

£1,200* + VAT

*includes a ticket to the AFM Conference

Dates 2022

Tues 27 Sept, 09.45 - 16.30 (in-person)
Mon 3 Oct, 13.00-15.00 (remote)
Tues 4 Oct, 13.00-15.00 (remote)
Wed 5 Oct, 13.00-15.00 (remote)
Mon 10 Oct, 09.00-10.45 (AFM Conference)
Tues 11 Oct, 13.00-15.00 (AFM Conference)

Meet the trainer

Dave Crowther

Dave has equipped executives from financial mutuals in over 80 countries with practical thinking tools for leading in complex situations. He acquired an understanding of strategy and behaviour while managing a European investment fund and ‘accidentally’ co-founding a software company ultimately acquired by IBM.

Dave refined the tools while designing a global cultural change initiative for a company within the Berkshire Hathaway family. He learned to be humble in the face of complexity when working on NHS strategic behavioural change interventions. Demonstrating that people are not rational, he enjoys cycling up hills.

Ongoing mutual support

Mutual support as a group and with AFM to achieve your goals

Pre-work

Engaging quiz
Introducing yourself and your organisation
30 mins

In person session 1

The fundamentals of leading with purpose
Tues 27th Sep 09.45 - 16.30
Brief refresher video & personal reflection
What was most useful regarding session 1?
15 mins

Remote session 2

Leading teams in a complex world
Mon 3rd Oct 13.00-15.00
Brief refresher video & personal reflection
What was most useful regarding session 2?
15 mins

Remote session 3

Leading strategically in a complex world
Tues 4th Oct 13.00-15.00
Brief refresher video & personal reflection
What was most useful regarding session 3?
15 mins

Remote session 4

Activating strategy in mutual organisations
Wed 5th Oct 13.00-15.00
Brief refresher video & personal reflection
What was most useful regarding session 4?
15 mins

In person session 5

Peer to peer consultancy
Mon 10th Oct 09.00 - 10.45

In person session 6

Translating your learning into value
Tues 11th Oct 13.00 - 15.00
Focus on topics selected to synthesize key themes of the conference and topical generic challenges of leadership in 2022. Participants practise using tools from the course, and will be primed to connect concepts they encounter with their work, goals and purpose.

Excellent blend of learning, networking, discussions and content that really held the attention. Multiple “take-aways” to apply moving forward - many thanks.

Head of Business Development, Financial Mutual, UK

Participants will draft their personal habit canvas to make it easier to translate their first desired behavioural change inspired by the course (and conference) into a repeatable habit. The session will conclude with the co-development of a clear next action to sustain momentum.

AFM Conference & key mutual leadership themes

Preparing for Session 6

Reviewing all learning
Identifying your focus
30 mins

Dave refined the tools while designing a global cultural change initiative for a company within the Berkshire Hathaway family. He learned to be humble in the face of complexity when working on NHS strategic behavioural change interventions. Demonstrating that people are not rational, he enjoys cycling up hills.
Overview
A series of six, one day workshops (delivered, in-person, over a 6 month period) that target all the essential elements needed by managers today.

Each event will be delivered in a practical way with ‘application at work’ at the forefront. Delegates will be able to build their skills and confidence in a way that will enable better learning retention as well improved impact in the workplace.

In addition to being equipped with the ‘tools for the job’, the Stepping Up programme enables the creation of enduring professional networks that are so vital in our industry today.

Who should attend?
New managers and supervisors within AFM Member organisations, or those facing a step change in their responsibilities.

Cost per delegate
£2,200* + VAT
*includes a ticket to the AFM Conference (An optional CMI qualification is also available at an additional £500/person)

Dates 2022
Wed 29 June
Wed 12 Oct
Tue 26 July
Thurs 10 Nov
Thurs 8 Sept
Wed 7 Dec

Approximate timing: 9.30am - 4.30pm

Meet the trainer
Les Wix
Les has over 25 years experience in Learning & Development.. Specialising in Leadership and Management, Les has worked across many sectors in different parts of the world.

His commercial background ensures there’s always an eye on the bottom line as well as a return on investment. He has always had an interest in the design as well as the delivery of training interventions, hence his appreciation of clarity of objectives and a focus on outcomes.

Les has an engaging style and is comfortable with delegates at all levels; in turn he makes those he works with also feel comfortable, ensuring participation and involvement throughout the programmes he delivers. 2022 sees the fifth year of his involvement with AFM on the Stepping Up programme.

Cost per delegate
£2,200* + VAT
*includes a ticket to the AFM Conference (An optional CMI qualification is also available at an additional £500/person)

Dates 2022
Wed 29 June
Wed 12 Oct
Tue 26 July
Thurs 10 Nov
Thurs 8 Sept
Wed 7 Dec

Approximate timing: 9.30am - 4.30pm

Meet the trainer
Les Wix
Les has over 25 years experience in Learning & Development.. Specialising in Leadership and Management, Les has worked across many sectors in different parts of the world.

His commercial background ensures there’s always an eye on the bottom line as well as a return on investment. He has always had an interest in the design as well as the delivery of training interventions, hence his appreciation of clarity of objectives and a focus on outcomes.

Les has an engaging style and is comfortable with delegates at all levels; in turn he makes those he works with also feel comfortable, ensuring participation and involvement throughout the programmes he delivers. 2022 sees the fifth year of his involvement with AFM on the Stepping Up programme.

### Overview
A series of six, one day workshops (delivered, in-person, over a 6 month period) that target all the essential elements needed by managers today.

Each event will be delivered in a practical way with ‘application at work’ at the forefront. Delegates will be able to build their skills and confidence in a way that will enable better learning retention as well improved impact in the workplace.

In addition to being equipped with the ‘tools for the job’, the Stepping Up programme enables the creation of enduring professional networks that are so vital in our industry today.

### Who should attend?
New managers and supervisors within AFM Member organisations, or those facing a step change in their responsibilities.

### Cost per delegate
**£2,200* + VAT**
*includes a ticket to the AFM Conference (An optional CMI qualification is also available at an additional £500/person)

### Dates 2022
- Wed 29 June
- Wed 12 Oct
- Tue 26 July
- Thurs 10 Nov
- Thurs 8 Sept
- Wed 7 Dec

Approximate timing: 9.30am - 4.30pm

### Meet the trainer
**Les Wix**
Les has over 25 years experience in Learning & Development.. Specialising in Leadership and Management, Les has worked across many sectors in different parts of the world.

His commercial background ensures there’s always an eye on the bottom line as well as a return on investment. He has always had an interest in the design as well as the delivery of training interventions, hence his appreciation of clarity of objectives and a focus on outcomes.

Les has an engaging style and is comfortable with delegates at all levels; in turn he makes those he works with also feel comfortable, ensuring participation and involvement throughout the programmes he delivers. 2022 sees the fifth year of his involvement with AFM on the Stepping Up programme.

### Who should attend?
New managers and supervisors within AFM Member organisations, or those facing a step change in their responsibilities.

### Cost per delegate
**£2,200* + VAT**
*includes a ticket to the AFM Conference (An optional CMI qualification is also available at an additional £500/person)

### Dates 2022
- Wed 29 June
- Wed 12 Oct
- Tue 26 July
- Thurs 10 Nov
- Thurs 8 Sept
- Wed 7 Dec

Approximate timing: 9.30am - 4.30pm

### Meet the trainer
**Les Wix**
Les has over 25 years experience in Learning & Development.. Specialising in Leadership and Management, Les has worked across many sectors in different parts of the world.

His commercial background ensures there’s always an eye on the bottom line as well as a return on investment. He has always had an interest in the design as well as the delivery of training interventions, hence his appreciation of clarity of objectives and a focus on outcomes.

Les has an engaging style and is comfortable with delegates at all levels; in turn he makes those he works with also feel comfortable, ensuring participation and involvement throughout the programmes he delivers. 2022 sees the fifth year of his involvement with AFM on the Stepping Up programme.
MASTERS PROGRAMME IN STRATEGIC LEADERSHIP

Programme overview

Launched in 2015, the 3-year part-time Masters programme is content rich with key elements geared for those who work in a customer-owned/mutual financial services firm.

The programme starts in October 2022, with the deadline for applications of 31 July.

Since it first started in 2015, this programme has successfully helped to build leadership capability in our sector - to the advantage of individual students and their organisation.

To date, 105 students from members of the Building Societies Association (BSA) have undertaken challenging but rewarding study on this three-year part-time programme. In 2021 BSA members were joined for the first time by three students from AFM members.

The programme teaches critical management and leadership skills, and gives awareness and knowledge of the key issues and challenges that exist, including:

- Personal values and effectiveness
- Managing organisational resources
- Information management
- Leading and influencing change
- Strategy governance and risk
- Strategic marketing
- Strategic operations management
- Value focused decision making
- Business improvement through innovation
- Plus a Masters business project

Entry requirements

A minimum of three years’ management/professional experience and ideally an undergraduate degree or relevant professional qualification. This programme is also open to candidates who do not have a degree but have been identified by their employer as meeting the necessary requirements to successfully complete the programme.

Programme routes

<table>
<thead>
<tr>
<th>Senior Leader Apprenticeship Route</th>
<th>Standard Route</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fees</strong> (for 3 yrs)</td>
<td><strong>£15,000 (no VAT)</strong></td>
</tr>
<tr>
<td>£19,000 (no VAT) fees for the first two years are covered via the Levy programme, as well as a proportion of the third (see Guide, below, for more)</td>
<td></td>
</tr>
<tr>
<td><strong>Additional costs</strong></td>
<td></td>
</tr>
<tr>
<td>Each module will normally require a residential stay at Loughborough University. The on-campus hotel accommodation at Burleigh Court is currently £106.00 per night for bed and breakfast. Other on campus accommodation options are available.</td>
<td></td>
</tr>
</tbody>
</table>

For full programme details and information on how to enrol, see the Employers Guide 2022-25
NEXT STEPS

Stepping Up
For programme specific queries, please contact Les Wix on 07872 166474
leswix@btinternet.com

To book onto the programme, contact Tamassin Larocque-Fathers, AFM
tamassin@financialmutuals.org 07741 656605

Mutual Leadership
For programme specific queries, please contact Dave Crowther on
crowther.david@gmail.com

To book onto the programme, contact Tamassin Larocque-Fathers, AFM
tamassin@financialmutuals.org 07741 656605

Masters in Strategic Leadership
For all programme enquiries, contact Vicki Unwin, Loughborough School of
Business & Economics v.e.unwin@lboro.ac.uk
Tel: 01509 222 160
Mobile: 07816 977 643

Putting members first