



# Leadership and Management Development

2024



# I am delighted to be able to share with you our enhanced leadership and management development offering for 2024.



*Andrew Whyte*  
*Chief Executive, AFM*

In addition to our highly successful Management Development Programmes, Mutual Leadership and Stepping Up, we've introduced new opportunities for Executive and Non-Executive Directors to develop and enhance the skills and knowledge needed to be an effective member of a Board in a financial Mutual or Friendly Society.

We also continue to work in partnership with Building Societies Association and Loughborough University to deliver the MSc in Strategic Leadership, and we have developed a new Mentoring Scheme for AFM Members.

**We very much hope that you will decide to take up the opportunity of personal development, to help strengthen and enhance the Mutual sector for the future. Our 2024 offering is summarised in the boxes below and further detail is provided in this brochure.**

## Board Director Development

**For Executive and Non-Executive Directors:**

- Role of the Director  
*(1-day in person event)*
- Board Director Development Programme  
*(5 full-day events, delivered in person over 9 months)*

[See page 3](#)

## Mutual Leadership

**For busy managers and emerging leaders in AFM member organisations.**

*(delivered through a mix of online and face-to-face sessions across 3 weeks)*

[See page 7](#)

## Stepping Up

**For new managers and supervisors, or those facing a big step change in their responsibilities.**

*(6 full-day events, delivered in person over 6 months)*

[See page 10](#)

## MSc in Strategic Leadership

**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.**

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## AFM Mentoring Scheme

**A relatively informal scheme designed to enhance opportunities for learning and networking across our membership.**

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# Board Director Development

To be an effective, value-adding member of the Board, Directors must develop elevated skills and approaches specific to the needs of their organisation. AFM's options for Board Director Development give Members the opportunity to review and address real-world scenarios and learn from experiences of peers within the Financial Mutual and Friendly Society sector, providing access to professional, value-adding facilitation.



# Role of the Director

A 1-day course designed for new and current Executive and Non-Executive Directors who will benefit from developing a more thorough understanding of the roles and responsibilities of a Director and a Board. The course runs 3 times a year, is tailored in respect to a Mutual organisation or Friendly Society, and serves as a stand-alone course or as an introductory module to the more in-depth 5-day Board Director Development Programme that commences in September.

Programme Overview	
<b>Morning</b>	<ul style="list-style-type: none"><li>• Introductions: Success/Behaviour</li><li>• Aims and Objectives</li><li>• Role of the Director</li><li>• Room 101: worst fears, reality &amp; opportunity</li></ul>
Break	
	<ul style="list-style-type: none"><li>• The Mutual Board</li><li>• Virtues of Mutuality</li><li>• Ethics and Values</li></ul>
Lunch	
<b>Afternoon</b>	<ul style="list-style-type: none"><li>• Laws, Regulations and Codes</li><li>• Governance</li><li>• Risk</li></ul>
Break	
	<ul style="list-style-type: none"><li>• Value Creation Process:<ul style="list-style-type: none"><li>» Financial</li><li>» Manufactured</li><li>» Intellectual</li><li>» Human</li><li>» Social &amp; Relationships</li><li>» Natural</li></ul></li></ul>
Plus, networking dinner and Guest Speaker (subject to host facilities)	

## Duration:

1-day, from 9.30am – 4.30pm

## Dates:

16 April 2024 / 26 June 2024 / 5 November 2024

## Cost:

£500 + VAT per delegate

## Location:

to be confirmed, though likely to be in London

# Board Director Development Programme

A 5-day programme (spanning 9 months) that takes an action learning approach tailored specifically for financial mutual organisations. It is designed to provide an enriching learning experience for Executive Directors and Non-Executive Directors, enabling them to develop, through practical experience, the foresight and strategic capability required to facilitate success in the Boardroom. The programme's focus on exploring and shaping thinking around practical, workplace challenges equips participants with the essential skills needed to be an effective Board practitioner. It expands the individual's thinking to help create innovative, value-enhancing and sustainable solutions for competitive advantage.

Participants must have already completed the Role of the Director course (or equivalent) before registering for this programme.

## Programme Overview

### 01 STRATEGY

To develop the participant's capability to approach workplace challenges from a Board-level strategic standpoint and deliver stakeholder value, to generate competitive advantage.

- Strategic thinking
- Strategic modelling
- External/Close/Operating Environment
- Stakeholder Mapping
- Scenario Planning
- Sensitivity Analysis
- Risk
- Key Performance Indicators

### 02 LEADERSHIP

To develop the participant's understanding of their personal leadership style and approach in the context of their Board, organisation and the wider system within which it operates.

- Personal Leadership
- Board Leadership
- Culture
- System Leadership
- Power
- Politics
- Case Studies
- Action Plan
- Networking dinner (subject to host facilities)

### 03 TRANSFORMATION & CHANGE

To encourage Directors to expand their thinking, create innovative solutions and embrace change and turn their organisations into engines of growth and transformation.

- Change Models
- Resilience
- Balanced Scorecards
- Behaviours
- Mental Health
- Learning and Innovation
- Case Studies
- Action Plan

### 04 ROLE OF THE BOARD & BOARD CRAFT

To build upon the Role of the Director by practising skills and emulating behaviours of effective Chairs, Executive and Non-Executive Directors.

- Chair
- Executive Director
- Independent Director
- Succession
- Diversity
- Board Simulation
- Action Plan

### 05 REVIEW & FUTURE PLANNING

To present back learning and associated benefits derived from the action learning process attached to the programme and to establish future momentum.

- Action Learning Project Review and Presentations
- Preparing for the future
- Presentation of Certificates of Achievement
- Networking dinner (subject to host facilities)

# Board Director Development Programme

## Duration:

5-days over 9 months,  
each day running from 9.30am – 4.30pm

## Dates:

18 Sept 2024 / 13 Nov 2024 / 29 Jan 2025 / 26 March 2025 / 4 June 2025

## Cost:

£2,400 + VAT per delegate for the full programme

## Location:

to be confirmed, though likely to be in London

## Benefits of Board Director Development

- Develop a **more thorough understanding of the roles and responsibilities** of a Director and enhance your Board's capability.
- Review and address **real-world scenarios and learn from experiences** of peers within the Financial Mutual and Friendly Society sector
- Access **professional, value-adding facilitation** at a heavily discounted rate against the IoD equivalent programmes

## Lead Facilitator

Dean has held numerous Board appointments across the private, public and voluntary sectors for three decades and developed an international career with experience working on Boards in Africa, Australasia, Europe, North America and the UK.

Currently Chair of the Midlands Engine Health Care and Life Science Board, Dean is also Independent Chair of Quality Safety and Risk at Voyage Care, a Non-Executive Director on the Board of the Parliamentary Health Service Ombudsman (where he chairs the Quality Committee) and a Non-Executive Director for the Academy of Health Care Science (where he is Chair of the Life Science Industry Steering Group). He is also an investor or advisor to digital health organisations ATPMS, Blum Health, Cerina, NeedleSmart, Oxehealth, PDMS, Sekoia and Tuli Health and chairs the Midlands Medilink Digital Health Special Interest Group.

Dean's exceptional capability as a Board and Executive Development specialist has been recognised by several Honorary appointments (Professor in Practice of Leadership and Enterprise at Cass, now Bayes, Business School, Professor of Governance and System Leadership at Leeds Business School, Professor of Leadership at the University of Nottingham Business School, and Professor of Organisational Resilience at Lincoln International Business School). He became an external programme tutor for the IoD in 1995 and has worked with the IoD in Australia, New Zealand, Nigeria and the Middle East as well as in the UK. In addition, Dean provides independent Board Effectiveness reviews and personal mentoring services to Chairs, Directors and aspirant Directors.

## Professor Dean Fathers



# Mutual Leadership

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



# Mutual Leadership Development Programme

**A series of five development sessions targeted at new and emerging leaders, to enable them to:**

- Learn the essential frameworks, mental models and 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.

## Programme Overview

### Module 1 (In Person)

Wednesday 20<sup>th</sup> November 2024

#### The fundamentals of leading with purpose

- How we see, think and act
- Essence of complexity
- Leading with purpose
- Many mental models
- Diagnose before treating
- 3 behavioural levers

### Module 2 (Remote)

Monday 25<sup>th</sup> November 2024

#### Leading teams in a complex world

- How teams overcome errors of perception
- How groups decide
- 3 steps to harnessing collective intelligence
- Psychological safety

### Module 3 (Remote)

Wednesday 27<sup>th</sup> November 2024

#### Leading strategically in a complex road

- The power of the outside view
- The essence of strategy
- 3 simple challenges
- The pre-mortem
- Strategic framework

### Module 4 (Remote)

Friday 29<sup>th</sup> November 2024

#### Activating strategy in mutual organisations

- How culture works
- Strategy activation
- Learning systems
- Strategy activation plays for leading purpose
- Building a learning culture

### Module 5 (In Person)

Wednesday 4<sup>th</sup> December 2024

#### Translating your learning into value

- Peer to peer leading with purpose
- How habits work
- Innovation matrix
- Implementation plan
- Habit canvas



# Mutual Leadership Development Programme



- Learn the essential frameworks, mental models and 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.



**The Programme is delivered through a mix of in-person and remote sessions:**

**Module 1** (in person):  
Wednesday 20<sup>th</sup> November

**Module 2** (remote):  
Monday 25<sup>th</sup> November

**Module 3** (remote):  
Wednesday 27<sup>th</sup> November

**Module 4** (remote):  
Friday 29<sup>th</sup> November

**Module 5** (in person):  
Wednesday 4<sup>th</sup> December

*Please note these dates may be subject to change once applications are received.*



**£1,200 + VAT per delegate for the full programme**

The programme fee includes a complimentary ticket to the AFM Annual Conference on October 7 & 8 and 1-night accommodation at the Conference hotel.

**Please note:** the venues for all sessions will be determined once all applications have been received.

**The deadline for applications is 30 June 2024.**

## Course 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.

# Stepping Up

For new managers and supervisors within AFM Member organisations, or those facing a big step change in their level of responsibility.



# Stepping Up Development Programme

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.

## Programme Overview

### All About You

- ▣ Your work behavioural style
- ▣ Identifying blind spots
- ▣ Applying your strengths at work
- ▣ Drivers of effectiveness
- ▣ Impact on those around you
- ▣ Assess your leadership style

### Managing your Resources

- ▣ Setting direction & clarity of expectation
- ▣ Planning & self- organisation
- ▣ Effective Influencing
- ▣ Coaching & mentoring

### Essential Management Tools

- ▣ Performance Management
- ▣ Teams & teamwork
- ▣ Effective communication
- ▣ Difficult conversations

### Delivering Performance Improvements

- ▣ The need for change
- ▣ Considerations for change
- ▣ Managing personal change
- ▣ Implementing change to your team

### The Broader Management Agenda

- ▣ Operational v Strategic
- ▣ Strategic thinking
- ▣ Setting the right objectives
- ▣ Managing conflict

### Managing Your Personal Brand/ Enabling Career Growth

- ▣ Building a professional reputation
- ▣ Understanding how others perceive you
- ▣ Positive & negative impact
- ▣ On-going development

# Stepping Up Development Programme



- Learn the essential frameworks, mental models and 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.



**The Stepping Up Development Programme is delivered over six 1-day events:**

**Module 1** (in person):  
*Thursday 18<sup>th</sup> April*

**Module 2** (in person):  
*Wednesday 22<sup>nd</sup> May*

**Module 3** (in person):  
*Wednesday 19<sup>th</sup> June*

**Module 4** (in person):  
*Thursday 18<sup>th</sup> July*

**Module 5** (in person):  
*Wednesday 21<sup>st</sup> August*

**Module 6** (in person):  
*Thursday 12<sup>th</sup> September*

*Please note these dates may be subject to change once applications are received.*



**£2,200 + VAT per delegate for the full programme**

The programme fee includes a complimentary ticket to the AFM Annual Conference on October 7 & 8 and 1-night accommodation at the Conference hotel.

**Please note:** the venues for all sessions will be determined once all applications have been received.

**The deadline for applications is 31 March 2024.**

## Course 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. 2023 sees the 6<sup>th</sup> year of his involvement with AFM on the Stepping Up programme.



# MSc in Strategic Leadership

An award-winning venture between AFM, the Building Societies Association and the School of Business and Economics at Loughborough University.



The part-time masters in Strategic Leadership is for experienced professionals with significant technical or subject area expertise who are now ready to develop their leadership capabilities.

The programme supports the development of skills across a range of functions, covering the latest theories and thinking in areas such as leadership, strategy, governance, risk management, influencing organisational change, ethical decision making, information management and innovation.

The 2024 programme will start in October and the deadline for applications is 31 July. For more information, please contact Andrew Whyte, AFM Chief Executive: [Andrew@financialmutuals.org](mailto:Andrew@financialmutuals.org)





# AFM Mentoring Scheme



AFM Members have for many years acknowledged the benefits of learning from each other and working collaboratively to shape the strategic direction of the sector, ensuring our people are equipped with the skills, knowledge and motivation to drive the sector forward.

The AFM Mentoring Scheme offers an informal approach to enhancing this connectivity across AFM Member organisations, encouraging individuals to share experience and learn from the expertise of others in a similar field or role, with a view to unlocking an individual's potential to drive innovation and excellence in the sector.

The AFM Mentoring Scheme is informal in nature. Responsibility for the mentoring relationship is devolved to the individual participants and their organisations. It is a guided relationship where individuals can benefit from their Mentor's specialist experience and expertise.

## **AFM will:**

- help to identify volunteer Mentors and potential Mentees
- maintain a register of AFM Members interested in becoming Mentors and Mentees
- link up interested parties

The aim is to facilitate the development of longer-term networks across AFM Member organisations and, as part of AFM's ongoing support and commitment to Members, there is no fee charged for engaging in this Scheme.

**For any questions about the Mentoring Scheme, or to register your interest in becoming a Mentor or Mentee, please contact Andrew Whyte, AFM Chief Executive: [Andrew@financialmutuals.org](mailto:Andrew@financialmutuals.org)**

## Next Steps

For further information about any of the programmes, including how to apply, please contact Andrew Whyte, AFM Chief Executive: [Andrew@financialmutuals.org](mailto:Andrew@financialmutuals.org)