The New England Leadership Development Program

Sunday, September 30 – Wednesday, October 3, 2018

Babson Executive Conference Center
Wellesley, Massachusetts
You have been identified as an effective manager. You successfully implement the objectives of your bank. But are you truly regarded as a leader within your organization? Does senior management rely on you to help shape the vision of the future, to promote core values, and to motivate your team to achieve their chosen goals? Recognizing that leaders-in-fact and leaders-in-training need a non-threatening environment to acquire or practice the skills of leadership, Massachusetts Bankers Association, in coordination with other New England Bankers Associations, has designed a leadership workshop – The New England Leadership Development Program. This highly-interactive workshop admits only a small group of senior managers, putting them in a supportive learning environment and providing the opportunity to explore the role and responsibilities of a leader.

This three-day program is highly recommended for graduates of the New England School for Financial Studies, but welcomes other middle and senior managers from financial institutions. Class size is limited to allow for maximum educational benefit and personal attention. Peer interaction, critical self-evaluations, and lively case study discussions are hallmarks of this excellent intensive program.

PROGRAM HIGHLIGHTS

Self-Awareness – Self Assessment – 180 Evaluation

Two assessment tools will be used, making the program uniquely personal. Using an online self-evaluation tool, you will first create a profile of your strengths – those talents that make you shine. A tailored leadership guide will be provided as well as recommended strategies for leading a team of diverse talents.

In the second evaluation, you will complete a survey describing your own management style. Six of your subordinates or peers will be asked to anonymously complete the same checklist, describing how they perceive these same characteristics in you. A confidential report will be prepared for you that compares your results to critical leadership requirements of succession planning, attracting and holding high potential talent, improving staff engagement and operating in a global environment.

In combination with these assessment reports, you will learn to use the FeedForward techniques to engage in self-improvement in those areas of leadership most necessary for your professional success.

The Shift from Management to Leadership

As a manager you focus on problem-solving, producing results, organizing, and controlling the process. As a leader, your role and focus must shift to creating and communicating a vision, defining and executing strategy, a heightened awareness of change, and, most importantly, influencing and inspiring others to achieve the company goals. Group discussions will explore effective techniques for making this mindset switch.

Leading the Diverse Team

To paraphrase Rocky Balboa, “I’ve got gaps; they’ve got gaps; together we have no gaps!” That would be the description of an excellent team. Acknowledging the team diversity of style, generation, culture, strengths, and weaknesses, and then turning the richness of that blend into a positive force will be the focus of this session. A team exercise will give you a chance to put recommendations to work in a hands-on simulation.

Putting It to Work – Case Study Round Tables

Under the guidance and mentorship of senior officers from community banks, you will work through actual problems faced by executives in the industry on a daily basis. The emphasis will be on practical solutions to dilemmas of communication, delegation, staff development, decision-making, ethics, motivation, and conflict resolution. Drawing on the collected experience of these mentors, your fellow attendees will enrich and broaden your perspective of the presented cases.
**Going from Existing to Excelling … and Taking Others with You**

Most people go through life merely existing when excelling -- being the very best -- is so readily attainable. Since leadership is the ability to inspire the best in others to mutual advantage, learn how to leverage the talent in your organization. Through a highly-charged, engaging session, you will explore critical success factors, realize the right questions to ask, and develop an action plan that will assist you in building your own personal Center of Excellence.

**The Leader’s Perspective**

Today’s leader must look beyond his or her own department or division. These three workshops will explore issues that you, as an executive, must factor into a required global perspective.

- **Financial Leadership**: Understanding the Key Elements of the Balance Sheet
- **Hot Buttons of Compliance**: Cyber Security, Social Media, Privacy, Regulatory Concerns
- **Grassroots Advocacy**: Working with Legislators and Regulators for Success

At the conclusion of this program, you will create a **personal action plan**, drawing on all of the insights you have explored throughout the workshop: your own strengths and weaknesses, the recommended strategies and techniques, and the readings and discussions with the executive mentors and fellow participants.

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<thead>
<tr>
<th>Sunday, September 30</th>
<th>Monday, October 1</th>
<th>Tuesday, October 2</th>
<th>Wednesday, October 3</th>
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<tbody>
<tr>
<td><strong>Strengths-Based Team Leadership</strong></td>
<td><strong>Financial Leadership</strong>: Understanding the Balance Sheet</td>
<td><strong>Personal Action Plan</strong></td>
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<td>Diversity of Style, Generation and Culture 8:30 - 10:00 a.m.</td>
<td>Dr. James Clarke 8:30 - 10:00 a.m.</td>
<td>8:30 - 9:30 a.m.</td>
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<td><strong>Break</strong></td>
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<td><strong>Consensus Building</strong> 10:15 a.m. - Noon</td>
<td><strong>Management Feedback Profile: Part 1</strong> 10:15 a.m. - Noon</td>
<td><strong>Moving from Existing to Excelling — and Taking Others with You</strong></td>
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<td><strong>Registration 2 - 3 p.m.</strong></td>
<td><strong>Lunch</strong></td>
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<td><strong>Ice Breakers &amp; StrengthFinders 2.0 De-Brief</strong> 3:00 - 5:00 p.m.</td>
<td><strong>Leadership Case Studies</strong> - #1 1:00 - 3:00 p.m.</td>
<td><strong>Management Feedback Profile: Part 2</strong> 1:00 - 3:30 p.m.</td>
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<td><strong>Break</strong></td>
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<td><strong>Leadership Case Studies</strong> - #2 3:15 - 5:15 p.m.</td>
<td><strong>Communication Effectiveness</strong> 3:45 - 5:30 p.m.</td>
<td><strong>Dinner</strong></td>
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<td><strong>Grassroots Advocacy</strong> 7:30 - 8:30 p.m.</td>
<td><strong>Hot Issues in Compliance</strong> Denyette DePiero 7:30 - 9:00 p.m.</td>
<td><strong>Moving from Existing to Excelling — and Taking Others with You</strong></td>
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GLORIA PRITCHARD-BECKER
Principal
Glory B & Associates
Lexington, KY

Ms. Pritchard-Becker is the Principal of Glory B & Associates, a management and leadership development organization with offices in Lexington, KY. She specializes in designing development programs for financial services firms. Drawing on her prior experience as Senior Director of Program Development with both the American Bankers Association and America’s Community Bankers, Ms. Pritchard-Becker brings a breadth and depth of understanding of the qualities and skills needed to succeed.

She began her banking career as a CSR at a Denver commercial bank, advancing to a vice president and trust officer at a $3.6 billion New York City savings bank.

Ms. Pritchard-Becker brings to her consulting work more than 35 years of practical experience as a senior officer, a banker, and a mentor to hundreds of community bankers. She has gained insights through engagement with the clients, faculty and bankers involved in the workshops and schools programs she created.

DR. JAMES J. CLARKE
Principal
Clarke Consulting
Villanova, Pennsylvania

Jim has conducted seminars on ALM and strategic planning for bank associations and individual banks. He has worked with the Risk Management Association (RMA), the Financial Managers Society (FMS).

He is a frequent speaker to bank boards, and banking conventions. In 2014-16 Jim spoke at the Connecticut, Maine, Pennsylvania Bankers convention, as well as the Pennsylvania Association of Community Bankers Convention, FMS Forum, COCC Member Conference, and the Ohio, Massachusetts, Maine, and Pennsylvania Bankers Directors Conferences. Jim is also a principal instructor of the New England School for Financial Studies.

Jim is currently a member of the board of two community banks and an investment management company. He has a B.A. in Economics from LaSalle College and a Ph.D. in Economics from the University of Notre Dame. He is a former faculty member in the Finance Department at Villanova University. Jim is on the editorial board of the RMA Journal.

DENYETTE DEPIERRO
Vice President & Senior Counsel, Center for Payments and Cybersecurity
American Bankers Association
Washington, D.C.

Denyette DePierro joined the American Bankers Association in March 2008. Prior to joining ABA, Denyette was Legislative Counsel at the Independent Community Bankers of America (ICBA) in Washington, D.C. and the California Independent Bankers in Newport Beach, California. Denyette received her J.D. and M.DR from the Pepperdine School of Law, where she was a fellow at the Straus Institute for Dispute Resolution. She received a B.A. from the University of California, Santa Barbara, and was a European Union Fellow at the University of Padua in Padua, Italy in Developmental Economics. At ABA, Denyette focuses on the regulation of cybersecurity, privacy, data security and emerging trends in banking, including technology, virtual currencies, and social media.

DR. JOSEPH L. MANCUSI
President, Center for Organizational Excellence, Inc.
Potomac Falls, VA

Joseph L. Mancusi, Ph.D. is President of the Center for Organizational Excellence of Potomac Falls Virginia. He is the author of several books including “Celebrating You the Truly Successful Woman”. He writes a weekly column titled: “Choose Health, Life and Love” He has directed the largest program of psychology in the world and has been featured on the Today Show, CNN and MSNBC.
Students are encouraged to reside at the Babson Executive Conference Center to experience all the benefits of this intense program. Located on Babson College’s campus in Wellesley, Massachusetts, the Center provides a blend of advanced conference facilities and thoughtful amenities in an ideal setting to share, engage, and learn. For directions, visit the center’s website, [http://www.babson.edu/executive-education/babson-executive-conference-center/Pages/conference-center-directions.aspx](http://www.babson.edu/executive-education/babson-executive-conference-center/Pages/conference-center-directions.aspx).

**Tuition**

$950.00 per person, members • $1,900 per person, nonmembers

**Accommodations**

$1,305 single occupancy – 3 nights (Includes the reception, all meals, and breaks.)

**Day Student Fee**

$590 (For those not requiring overnight accommodations. Includes the reception, all meals, breaks.)

**IMPORTANT:**

**Workforce Training Fund Express Program Requirements**

Qualifying financial institutions in Massachusetts can receive reimbursement up to 50% for employees who wish to take this course. The Workforce Training Grant Express Program assists companies to address their employee training. To receive the grant, banks need to complete a short, on-line application to request grant funds for this course. A financial institution whose request has been approved will be reimbursed for up to 50% of the actual cost of training which is $950 for this program. You may only request reimbursement for training individuals who are on your company’s payroll and work in Massachusetts.

The deadline to apply for a grant for this course is August 17. For more information or to apply, visit: [http://web.detma.org/WTF/Express/ep1.asp](http://web.detma.org/WTF/Express/ep1.asp). The program code is 1116916.
# The 2018 New England Leadership Development Program

Sunday, September 30 — Wednesday, October 3, 2018  
Babson Executive Education Center, Wellesley, MA  
**Limited to 50 Participants**  
Applications accepted until August 20, 2018

## Please type or print all information

Name:  

Nickname for Badge:  

Job Title:  

Institution:  

Business Address:  

Street  

City  

State  

Zip  

Date of Birth:  

Month  

Day  

Year  

Telephone Number:  

Business  

Home  

Cell  

Email Address:  

Banking Experience:  

Current Duties & Responsibilities (Explain briefly)  

Previous Banking Experience (Give inclusive dates)  

Accommodations Preference  

Single ☐  

Day ☐  

I hereby apply for admission to the New England Leadership Program  

X  

Mail to: Registrar-The New England Leadership Program-18  
One Washington Mall, 8th Floor, Boston, MA 02108-2603  

**DO NOT SEND CHECKS AT THIS TIME.** You will be billed for the total once acceptance into the program has been determined.